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GOING STRONG

After netting an all-time high
\$1 billion in sales last quarter,
Grocery Outlet is poised
for continued growth.



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Photo by Nicole Goss.

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COVER STORY

GOING STRONG

After netting an all-time high \$1 billion in sales last quarter, Grocery Outlet is poised for continued growth.

THE DATABANK

- 8** Sales data from IRI, courtesy of Peter Penguin and Bessie Bovine.



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TIME TO 'NAME AND SHAME'?

Some think U.S. retailers should take a page from Carrefour's playbook and call out CPGs guilty of 'shrinkflation.'

French supermarket chain Carrefour raised some eyebrows last month when it placed stickers on 26 products warning consumers that manufacturers had reduced the package size, effectively raising the price. The move reportedly comes in advance of contract talks later this month when the company hopes to renegotiate prices in the face of slowing inflation and reduced costs for oil, food ingredients and other raw materials.

DON'T PUNISH MANUFACTURERS

Our friends at online discussion forum RetailWire asked whether U.S. retailers should consider a similar strategy to force manufacturers they suspect of price-gouging to hold the line. Some respondents took issue with the attempt to penalize manufacturers just for trying to stay profitable during inflationary times. The problem with that, wrote panelist Gary Sankary, is that big CPGs are staying more than profitable "and they're using headlines [about inflation] as cover to do so."

And while some respondents believe consumers are savvy enough to figure out for themselves whether or not they're being ripped off — without the retailer's intervention — others disagreed. "The objective of shrinkflation is to fool the shopper for the company's own benefit," noted Gene Detroyer, who suggested that at least one person involved in the decision probably uttered the words "Consumers won't even notice." But if they did, guess who would get the blame? Not the manufacturer.

"I'd like to see U.S. retailers follow



Denise Leathers

Carrefour's lead," Detroyer continued. "Stop banging heads with the CPG salesperson and just give the shopper the information needed to make an informed decision. Then let the sales fall where they may."

I tend to agree with him. Not to punish CPGs or try to force their hand

in any way but simply to better serve shoppers. As panelist Jeff Sward wrote, "Why does this have to be a fight? Why can't it just be about transparency and full disclosure? Brands can make choices on how they package and price their products, and customers can make choices about what they buy. Of course it's a problem when the brand makes a very quiet, under-the-radar change. But if the retailer and the brand both simply make sure that the changes are fully disclosed then the customer will vote with their wallet."

He adds, "When customers know the retailer is operating in their favor, that builds loyalty. When brands know the retailer will flag changes if they don't, that builds disclosure at the brand level." It's that simple.

AN OPPORTUNITY FOR PL?

CPG shrinkflation could also create an opportunity for retailers to promote their national brand equivalent private label items by keeping them at their original size. If they call out the difference, some consumers are likely to make the switch. Either way, open communication is key.

Denise Leathers, Editorial Director
denise@frbuyer.com

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VOLUME 15 ISSUE 3

Paul Chapa

Sales Director, Managing Partner
paul@frbuyer.com
913-481-5060

Warren Thayer

Editor Emeritus, Managing Partner
warren@frbuyer.com
603-252-0507

Denise Leathers

Editorial Director
denise@frbuyer.com
215-489-5090

Betty Vandenberg

Art Director
betty@frbuyer.com

Michael Friedman

Managing Editor

Bob Anderson

Associate Editor

Contributing Editors:

George Anderson, Christine Blank, Neal Lorenzi, Don Stuart, Tiffini Theisen and Marianne Weaver

EDITORIAL ADVISORY BOARD

Bob Anderson, former vp of private label, Wal-Mart

John Crawford, IRI

Alison Bodor, president and CEO of AFFI

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warren@frbuyer.com

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MID- & THIRD-TIER FROZEN

BY PETER PENGUIN



During the 12 weeks ended Aug. 13, sales of frozen foods in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined

totaled \$18.23 billion, up 1.6% compared with the same period a year ago, according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. However, unit sales fell 3.9% to 3.55 billion.

For the 52 weeks ended Aug. 13, dollar sales jumped 6.6% to \$78.16 billion while units tumbled 4.8% to 15.43 billion.

Our chart shows the middle- and third-tier refrigerated subcategories (Nos. 13 to 40 in dollar sales), including the leading brands, for the 12 weeks ended Aug. 13. Note that, instead of reporting sales for multiple individual brands that fall under the same parent brand, Circana is now combining them into a single "brand franchise."

Only brand franchises with at least \$250,000 in sales during the period are listed.

FACTOIDS

4.6%

Percentage of bread/roll/pastry dough volume sold with merchandising support, lowest in the department among subcategories with at least \$1 million in sales.

0.7%

Percentage of the world's population that's likely to be drunk at any given time — roughly 52 million people.

© Can Stock Photo / AstarteJulia

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
MULTI-SERVE DINNERS/ENTREES	\$551,314,181	1.1	61,985,844	-2.3	138,288,626	-1.0

For top 10 brand data, see our story on Dinners & Entrees in this issue.

FRIES	\$486,601,936	28.9	98,843,924	-1.9	196,691,553	-7.1
Ore-Ida	\$146,353,255	18.1	24,631,608	-18.1	51,212,803	-17.3
Private Label	\$143,746,103	42.3	38,143,127	4.2	84,186,374	-7.4
Lamb Weston	\$122,103,908	18.2	21,330,612	-2.7	35,528,634	-1.0
Grown in Idaho	\$35,089,129	30.4	6,581,111	6.4	11,371,732	6.5
McCain	\$22,231,358	78.1	5,819,739	64.6	8,368,654	64.6
Rootscot	\$5,232,476	151.758	758,790			
Roots Farm Fresh	\$2,322,840	3608.8	284,903	2826.0	872,537	9458.6
Pictsweet	\$1,621,723	1.6	396,553	-12.6	466,217	-15.1
Buyers Best	\$325,568	288754.6	7,241	24869.0	217,230	374434.5

FRUIT	\$438,611,471	8.1	68,666,993	-1.6	111,328,947	0.9
Private Label	\$289,195,398	3.1	48,465,264	-5.6	84,213,688	-0.6
Tru Fru	\$44,098,408	111.2	5,913,378	78.0	3,421,661	106.4
Wyman's of Maine	\$25,157,868	4.7	1,968,915	1.7	5,889,461	1.7
Wyman's	\$18,405,044	8.5	2,266,761	3.0	4,007,661	7.2
Dole	\$17,599,168	-23.8	2,274,116	-34.2	3,642,560	-32.0
Goya	\$8,667,656	10.2	2,319,702	-0.8	2,163,721	0.5
Campoverde	\$8,236,692	30.0	690,002	27.7	2,107,003	71.2
Pitaya Plus	\$2,377,102	20.8	562,279	21.1	421,709	21.1
Seal the Seasons	\$2,147,966	-16.1	225,554	-19.5	448,256	-19.6
El Sembrador	\$1,737,430	3.1	490,354	-11.6	701,564	-4.0

TURKEY	\$431,216,884	3.9	63,302,987	1.3	94,556,029	1.6
Jennie-O	\$138,397,250	2.3	20,488,859	-1.0	31,848,529	0.3
Private Label	\$93,381,635	1.2	14,582,580	-8.8	19,833,400	-6.4
Butterball	\$92,837,469	12.9	12,312,283	26.8	19,954,307	14.0
Shady Brook Farms	\$47,654,543	12.1	6,866,238	14.9	10,434,062	14.2
Honeysuckle	\$24,849,581	3.2	3,930,424	-2.9	5,718,969	-0.8
Perdue	\$9,666,475	-15.7	1,753,182	-21.3	1,924,235	-21.8
Foster Farms	\$6,999,636	-10.3	1,093,716	-13.9	1,281,911	-11.4
Bubba Burger	\$5,789,075	-8.6	567,685	-11.5	1,304,147	-9.3
Royal	\$2,863,416	3.8	380,335	-7.2	724,885	-7.5
Plainville Farms	\$2,551,763	-25.3	312,687	-29.1	315,300	-28.6

WAFFLES	\$285,415,029	2.6	70,147,286	-6.9	70,690,010	-7.4
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For top 10 brand data, see our story on Breakfast Food in this issue.

BREAKFAST ENTREES	\$269,888,327	3.2	72,665,913	-0.6	54,361,245	-0.3
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For top 10 brand data, see our story on Breakfast Food in this issue.

FRESH BAKED BREAD/ROLL/BISCUIT	\$218,321,385	6.3	61,551,368	-3.6	52,276,719	-4.0
Private Label	\$72,207,878	14.5	25,786,829	-3.0	22,362,787	-0.8
New York	\$70,941,712	14.3	18,976,440	7.3	14,039,499	9.2
Sister Schubert's	\$21,178,528	5.1	3,992,932	2.1	4,561,080	-1.2
Pepperidge Farm	\$15,947,500	-8.2	4,118,910	-18.0	2,750,228	-18.3
Cole's	\$9,596,856	-25.8	2,492,097	-32.5	2,006,814	-45.1
Furlani	\$3,944,224	-3.1	1,484,842	-11.2	926,418	-10.3
Pillsbury	\$3,438,846	4.3	696,042	-12.5	1,316,816	-8.3
Mary B's	\$2,287,021	12.7	496,144	-5.5	1,011,632	-5.0
Udi's Gluten Free	\$2,116,823	-25.8	306,520	-35.0	322,551	-37.1
Rhodes Bake-N-Serv	\$2,014,732	-4.9	407,764	-6.0	514,544	-6.0

MIXED VEGETABLES	\$187,120,888	-0.6	80,289,176	-7.3	82,598,898	-4.2
Private Label	\$97,511,534	12.5	51,470,931	1.4	54,070,610	3.8
Birds Eye	\$48,193,887	-5.0	16,035,976	-12.5	16,947,376	-13.5
Pictsweet	\$19,845,594	-10.3	5,643,365	-16.2	5,758,271	-15.3
Green Giant	\$12,088,487	-37.9	3,976,108	-47.0	2,524,250	-42.1
Flav-R-Pac	\$2,723,512	-1.1	1,185,117	-1.4	935,918	-3.1
Hanover	\$1,482,373	6.8	552,058	-0.7	545,784	0.3
Goya	\$1,382,148	6.5	392,195	-8.1	492,153	-6.8
La Fe	\$923,470	3.2	272,071	-8.1	348,570	-4.9
El Sembrador	\$673,028	20.2	211,350	3.1	274,441	4.8
Cascadian Farm Organic	\$452,002	-17.2	102,372	-35.9	70,963	-35.0

SAUSAGE	\$163,051,037	4.8	34,079,937	-1.2	32,739,875	0.8
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*+9% unit sales and +25.1% dollar sales based on 52-week IRI data report ending 4/23/23 — Frozen Cookies.

Delizza
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\$589,177

Dollar sales racked up by Boba Bam instant frozen drink kit, one of the best performers among products in distribution less than a year. However, it wasn't enough to pull the frozen drink concentrate subcategory (-1.1%) out of the red.

-10.2%

Unit loss by No. 9 appetizers/snack rolls, biggest by a top 20 frozen subcategory (though dollars were down only 0.2%). Seven of the top 10 brands saw unit sales fall, but watch out for No. 9 CJ Foods (+27.7%).



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48%

Increase in male testosterone after chopping wood for an hour.

-50.7%

Unit loss by prepared veggies (sauce/crumbs), biggest loser among frozen subcategories with at least \$1 million in sales during the period.

1.1%

Unit gain by beans, the only plain veggie subcategory with at least \$10 million in sales during the period that saw unit sales rise.

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
Banquet	\$51,014,084	13.2	17,855,635	-1.1	12,024,250	3.3
Private Label	\$32,070,428	-0.2	3,946,171	4.3	6,254,486	-1.0
Jimmy Dean	\$18,171,165	12.7	2,747,423	9.9	3,666,104	10.6
Applegate	\$16,063,671	12.7	2,488,614	6.6	1,285,242	8.8
Purnell	\$10,587,009	-2.4	1,036,449	10.7	2,456,958	10.6
Jones	\$9,686,385	-8.7	2,351,705	-16.1	1,170,955	-16.4
Smithfield	\$5,635,842	28.3	1,030,292	20.3	1,129,026	19.8
Williams	\$3,045,666	0.9	354,675	3.2	768,457	2.2
Odom's Tennessee Pride	\$2,936,090	-12.2	270,922	-19.7	608,691	-18.2
Bob Evans	\$2,670,004	-18.5	289,459	-26.6	662,405	-26.1
SIDE DISHES	\$157,267,575	11.1	47,128,210	18.1	36,001,036	11.2
Birds Eye	\$49,812,904	-4.9	16,475,181	-7.7	11,413,251	-8.7
Green Giant	\$33,620,839	49.6	15,607,784	105.2	8,834,353	71.8
Private Label	\$15,330,631	12.7	4,080,157	10.8	4,290,386	14.6
Kraft	\$13,356,047	15.3	1,494,463	-2.0	1,521,437	8.4
InnovAsian	\$11,503,908	16.0	2,527,608	14.8	2,707,202	12.2
Stouffer's	\$6,183,588	130.5	1,356,048	63.6	1,497,152	139.8
Golden	\$2,873,922	-4.9	496,951	-12.2	373,226	-12.3
Savannah Classics	\$2,703,051	-1.6	718,279	-3.8	776,816	-5.1
P.F. Chang's	\$1,943,108	-26.2	418,911	-33.0	396,117	-36.6
Del Monte	\$1,313,458	52.6	510,060	63.8	318,788	63.8
POT PIES	\$133,393,782	-5.5	51,853,660	-11.1	34,871,705	-12.0
Marie Callender's	\$83,465,414	-5.5	19,590,052	-12.4	20,059,035	-12.4
Banquet	\$37,722,918	0.2	29,227,768	-8.4	12,820,716	-8.5
Blake's	\$3,381,166	6.5	753,509	-1.9	389,139	-1.7
Boston Market	\$2,363,341	-15.7	662,129	-22.8	662,129	-22.8
Atkins	\$1,873,649	-7.6	435,198	-10.6	244,799	-10.6
Willow Tree	\$1,051,648	12.8	152,568	3.5	152,028	4.1
Boomerang's	\$997,858	-35.3	244,307	-33.3	93,607	-31.9
Amy's	\$740,709	-26.3	147,534	-35.7	69,164	-35.7
Swanson	\$533,019	-13.3	392,337	-24.1	171,648	-24.1
ICE POP NOVELTIES	\$114,514,722	4.0	39,894,638	-0.6	129,262,267	-15.1
Fun Pops	\$38,015,102	-7.3	13,129,418	-10.4	55,961,925	-24.9
Pop Ice	\$9,855,522	15.7	2,232,372	13.9	11,260,437	-3.3
Wylers	\$7,918,367	28.6	1,507,566	-12.7	7,125,746	9.1
Otter Pops	\$7,608,548	5.3	1,223,394	-2.7	8,755,224	-12.4
Private Label	\$7,386,942	-18.2	1,772,838	-30.7	10,932,511	-30.0
Fla-Vor-Ice	\$7,085,896	30.0	1,154,223	-8.0	10,906,016	25.0
Dee Bee's Organics	\$6,820,779	27.9	1,181,177	19.9	1,680,837	26.5
Jel Sert	\$6,278,567	-2.9	2,647,434	8.6	4,492,170	-11.4
Big Easy Blends Icee Slush	\$5,793,408	40.2	5,310,767	36.2	1,991,590	35.5
Kool Pops	\$2,952,912	-12.4	1,215,899	-10.8	3,484,253	-24.0
BROCCOLI	\$111,266,078	9.2	48,372,826	-2.9	49,446,537	0.5
Private Label	\$64,942,628	19.9	32,676,198	5.3	35,094,950	9.9
Birds Eye	\$35,995,928	-1.4	11,934,641	-15.5	11,578,470	-16.5
Green Giant	\$3,572,923	-13.1	1,484,765	-20.3	922,560	-20.1
Pictsweet	\$2,807,207	-19.3	965,359	-32.7	766,507	-32.4
Hanover	\$1,794,414	7.4	689,284	0.7	561,162	0.6
No Brand	\$520,373	249.4	131,553	163.8	98,665	163.8
Cascadian Farm Organic	\$389,759	-10.2	87,845	-30.4	61,521	-31.0
Flav-R-Pac	\$317,689	-19.7	146,857	-23.7	111,978	-24.1
MEAT SUBSTITUTES	\$109,812,958	-3.3	17,937,910	-13.6	13,602,962	-12.2
Morningstar Farms	\$45,995,627	-5.0	8,521,324	-14.6	5,517,414	-13.1
Beyond Meat	\$15,384,204	-6.0	1,842,747	-7.6	2,009,623	-3.2
Gardein	\$14,813,095	-11.3	2,501,351	-22.0	1,991,639	-19.2
Impossible	\$13,334,742	16.4	1,271,436	4.0	1,491,701	3.0
Dr. Praeger's	\$5,909,345	-23.1	1,132,903	-25.6	760,645	-33.5
Boca	\$3,726,568	-23.3	842,970	-28.5	564,907	-32.1
Beyond Steak	\$3,638,384	*	523,766	*	353,932	*
Private Label	\$2,586,543	-19.2	561,040	-20.8	415,740	-24.1
Hilary's	\$623,558	-5.0	120,255	-15.9	76,354	-15.8
Quorn	\$471,982	-31.1	97,004	-31.2	72,824	-35.7



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-2.9%

Dollar loss by single-serve entrees (to \$1,327,781,593), despite a 2.2% gain by top seller Stouffer's. The rest of the top 10 saw their sales fall.



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28.9%

Dollar gain by No. 14 fries (to \$486,601,936), biggest by a top 20 frozen subcategory. (No. 15 frozen fruit, up 8.1%, was a distant second.)

-11.1%

Dollar loss by pot pies, the second-largest frozen subcategory (after snacks and apps) to post a double-digit decline.



© Can Stock Photo / kevers

14,334

Length in miles of the longest walkable distance on Earth, starting from Cape Town, South Africa, to Magadan, Russia. At 12.5 miles per day, it would take three years to complete the walk.

5

Number of \$1 million+ frozen subcategories that moved more than 40% of volume with merchandising support: ice pop novelties, ice cream, ice milk/ frozen dairy dessert, cookies and processed chicken.

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
ICE MILK/FZ DAIRY DESSERT	\$108,038,233	28.4	24,730,530	17.4	75,992,323	17.2
Breyers	\$48,267,879	-0.4	10,261,361	-13.7	30,203,453	-14.5
Blue Bunny	\$15,362,294	372.1	3,427,381	349.9	9,524,196	402.8
Turkey Hill	\$13,987,501	231.9	3,780,027	204.5	10,868,791	191.8
Private Label	\$13,213,375	11.3	2,752,428	-7.0	13,995,964	-2.6
Nestlé	\$10,115,517	51.5	2,550,004	51.7	6,097,749	58.2
Friendly's	\$2,704,752	0.5	684,257	-10.7	2,052,770	-10.7
Blue Ribbon Classics	\$2,298,169	59.3	794,991	51.4	2,384,973	51.4
Halo Top	\$747,680	-77.4	158,818	-77.1	158,818	-77.1
Hood	\$574,285	5.0	143,563	-15.3	430,689	-15.3
PIES	\$105,661,678	4.6	17,983,563	4.4	25,308,950	2.8
Edwards	\$47,633,068	16.8	8,598,632	21.4	9,547,140	17.6
Marie Callender's	\$42,400,826	-2.8	6,187,314	-10.3	11,361,780	-4.7
Mrs. Smith's	\$4,653,086	-0.7	724,563	4.9	1,659,846	5.1
Sara Lee	\$2,788,162	9.8	382,745	7.3	768,878	10.4
Private Label	\$2,102,144	-9.1	357,407	-24.5	599,876	-28.3
The Village Piemaker	\$1,678,839	1.0	115,412	-0.7	326,363	-5.6
Banquet	\$1,517,089	20.1	1,204,999	14.3	527,187	14.3
No Brand	\$758,429	*	160,156	*	158,859	*
HASH BROWNS	\$96,287,274	40.0	23,228,005	1.8	41,904,983	0.1
Private Label	\$48,661,254	54.1	13,587,442	2.0	24,330,980	-0.8
Ore-Ida	\$23,266,475	23.6	4,101,079	-14.1	7,713,123	-15.4
Mr. Dell's	\$3,857,250	13.4	909,035	-3.7	1,916,957	-2.1
Cavendish Farms	\$3,686,362	21.7	806,333	14.3	1,446,749	10.2
Glacier Gold	\$3,313,346	88.3	692,373	80.0	1,092,667	77.0
Mr. Dee's	\$2,474,725	65.3	632,984	47.7	1,127,210	51.5
Grown in Idaho	\$2,331,276	15.7	462,775	-9.2	809,855	-9.2
TJ Farms	\$2,241,232	139.8	513,092	93.4	812,227	90.5
J.R. Simplot	\$1,148,506	9.4	242,026	-5.3	497,547	-5.3
Lynden Farms	\$863,823	-2.4	273,349	-12.5	509,571	-11.5
ICE CREAM/ICE MILK DESSERTS	\$95,386,269	4.4	4,411,502	-3.7	13,952,218	-5.7
Carvel	\$64,431,314	6.4	2,804,179	-3.7	9,794,250	-3.2
Friendly's	\$11,072,921	15.1	532,361	0.7	1,684,949	-0.9
Private Label	\$9,056,567	-10.1	377,871	-23.8	1,056,500	-23.5
Jon Donaire	\$6,053,291	2.6	255,425	-7.5	693,814	-11.3
Uncle Harry's	\$2,008,391	-20.2	92,838	-24.9	247,000	-25.6
Halo Top	\$1,028,248	*	209,887	*	209,887	*
Celebration Foods	\$779,964	-32.8	53,479	-39.9	107,402	-41.9
Good Humor	\$306,184	-54.1	48,125	-55.1	65,874	-55.1
Abilyn's	\$256,749	63.4	15,100	45.7	24,538	45.7
TATERS	\$92,993,340	21.1	17,353,734	-14.4	37,982,784	-23.0
Ore-Ida	\$68,462,665	27.9	11,661,744	-11.5	24,565,808	-11.7
Private Label	\$22,387,026	7.2	5,138,510	-20.5	12,557,618	-38.7
Pacific Valley	\$1,599,165	8.7	414,332	12.2	541,443	17.3
Lynden Farms	\$253,992	11.1	67,096	-9.6	175,993	-2.8
OTHER PLAIN VEGETABLES	\$89,690,956	3.0	34,497,124	-4.1	32,362,116	-3.5
Private Label	\$41,677,013	1.2	21,934,205	-3.4	17,171,781	-5.6
Pictsweet	\$12,555,693	12.4	3,433,008	1.8	3,558,163	-2.8
Birds Eye	\$11,067,515	-11.0	3,428,775	-17.6	2,463,566	-23.6
Goya	\$5,756,053	40.5	1,195,754	19.7	3,051,769	27.4
Bueno	\$2,895,672	21.6	597,674	-0.5	594,036	-2.5
El Sembrador	\$2,371,173	49.5	478,024	15.6	1,427,213	22.2
Hanover	\$2,363,414	-0.1	882,994	-5.3	626,325	-5.5
Green Giant	\$2,081,724	-30.4	355,775	-28.6	489,394	-27.0
Seapoint Farms	\$1,393,639	-4.0	303,702	-5.7	418,542	-8.7
La Fe	\$1,330,034	23.2	271,520	3.9	796,137	14.2
WHIP TOPPINGS	\$88,066,226	6.0	41,655,887	4.1	24,839,425	4.8
Cool Whip	\$60,678,350	3.4	24,671,245	4.8	14,112,225	5.1
Private Label	\$25,130,523	9.6	16,170,140	1.1	10,213,567	2.4
Truwhip	\$1,765,817	43.0	580,697	39.8	354,913	38.2
FZ YOGURT/TOFU	\$85,651,421	-1.3	19,410,377	5.3	37,915,769	17.1

Cape Cod Select

Premium Frozen Cranberries

Holiday Feature

Bring fresh frozen cranberries to your freezer doors this holiday season.

We guarantee a quality product your customers will love.



FROZEN IS THE NEW FRESH

Available in 16oz resealable bag for freshness and convenience.

Zero additives, zero preservatives, just the whole fruit, frozen.

Make Cape Cod Select available for your customers this holiday season.

Email info@capecodselect.com

8

Number of frozen subcategories with at least \$1 million in sales during the period that registered double-digit unit gains. Second-biggest jump (after plain potatoes): side dishes (+18.1%).

106.2%

Dollar gain by private label all other pasta/noodles (to \$3,479,665), biggest by a store brand product with at least \$1 million in sales during the period.



© Can Stock Photo / richardmcmillin

7.2

Millions of years it would take for Mount Rushmore to erode into unrecognizability if it wasn't maintained.

4

Number of top 20 frozen subcategories that saw unit sales rise, including biggest gainer processed chicken (+2.6%).



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83.7%

Dollar gain by plain potatoes (to \$82,526,534), most by a frozen subcategory with at least \$1 million in sales during the period. It's also the biggest unit gainer (+30.5%).

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
Ben & Jerry's	\$20,088,287	-0.3	4,052,206	-5.8	4,052,206	-5.8
Private Label	\$17,492,673	16.5	5,915,754	68.0	18,390,979	75.4
So Delicious	\$16,205,189	-8.8	3,021,416	-11.8	3,062,673	-11.9
Kemps	\$7,497,731	-10.4	1,622,899	-16.4	4,916,033	-16.3
Oatly	\$5,396,102	15.2	1,146,057	20.3	1,147,214	20.4
Talenti	\$3,959,834	247.3	771,757	212.0	726,540	193.7
Breyers	\$2,838,821	50.1	572,141	34.9	1,716,423	34.9
Planet Oat	\$1,613,130	-44.0	343,123	-48.4	343,123	-48.4
Cado	\$1,203,846	-13.3	182,682	-21.1	182,682	-21.1
Enlightened	\$1,194,277	-37.0	221,632	-43.1	221,632	-43.1
PLAIN POTATOES	\$82,526,534	83.7	21,305,969	30.5	37,519,334	30.6
Private Label	\$48,586,530	93.9	14,572,348	23.6	27,245,841	24.8
Lamb Weston	\$10,047,983	21.7	1,692,261	5.7	2,385,603	8.3
Grown in Idaho	\$8,861,334	17.9	1,680,288	-2.6	2,922,582	-1.9
McCain	\$6,830,180	142.7	1,743,180	109.0	2,326,315	103.2
Ore-Ida	\$6,757,044	3575.4	1,185,371	2552.0	2,065,410	2541.5
Mr. Dee's	\$317,898	1.2	117,483	-3.8	176,224	-3.8
BEANS	\$75,902,856	15.7	33,201,769	1.1	28,897,375	0.1
Private Label	\$39,034,818	21.6	20,406,274	3.9	18,591,498	2.3
Birds Eye	\$13,306,706	1.3	5,585,923	-9.7	3,648,475	-11.2
Pictsweet	\$11,907,107	-3.7	3,565,463	-18.8	3,705,944	-12.7
Green Giant	\$4,311,379	377.5	1,469,559	336.8	929,129	324.0
Seapoint Farms	\$2,771,409	10.6	814,462	7.0	698,831	6.7
Hanover	\$1,638,163	-4.2	622,768	-7.7	561,546	-3.7
Goya	\$481,165	33.5	95,562	-3.5	118,457	5.0
Woodstock	\$261,012	8.9	66,501	2.9	41,660	2.8
SHERBET/SORBET/ICES	\$66,122,304	2.2	16,203,541	-9.7	35,155,694	-8.2
Private Label	\$24,722,068	1.4	7,072,948	-12.8	20,494,609	-9.3
Talenti	\$15,634,171	9.2	3,011,575	-2.5	3,011,575	-2.5
Blue Bell	\$3,718,258	1.0	773,475	-10.6	1,546,949	-10.6
Häagen-Dazs	\$3,507,001	1.2	763,067	-1.3	667,684	-1.3
Boardwalk Baskin-Robbins	\$3,180,564	2.1	900,296	-7.5	787,759	-7.5
Kemps	\$2,845,253	24.4	690,536	14.7	1,904,480	14.1
Prairie Farms	\$2,054,127	3.9	479,929	-8.3	1,448,266	-4.5
The Frozen Farmer	\$1,294,207	-10.8	227,032	-15.1	227,032	-15.1
Mayfield	\$749,422	8.9	214,260	-12.0	428,519	-12.0
Dean's	\$678,478	-21.1	211,281	-20.5	442,239	-28.5
BREAD/ROLLS/PASTRY DOUGH	\$58,116,875	16.3	11,627,699	2.9	24,094,564	0.5
Pillsbury	\$20,139,609	13.8	3,510,774	-6.7	9,240,912	-4.4
Rhodes Bake-N-Serv	\$10,624,047	3.7	1,870,429	0.7	6,080,736	-0.2
Goya	\$6,572,968	19.3	2,121,020	8.8	2,081,592	9.4
Mary B's	\$5,682,635	18.3	1,055,864	-0.1	2,727,464	1.2
Continental Mills Red Lobster	\$4,611,749	36.8	883,375	30.3	864,647	30.3
Private Label	\$2,306,460	9.9	503,810	0.1	1,060,579	-1.3
Athens	\$2,054,912	25.2	358,624	18.2	358,624	18.2
Anne's	\$913,033	5.7	187,719	-5.5	275,074	-5.6
Bridgford	\$762,445	16.0	169,261	9.5	383,306	8.0
El Sembrador	\$735,105	17.6	183,347	10.4	168,155	12.0
SWEET GOODS-NO CHEESECAKES	\$57,469,214	0.5	10,259,294	-6.5	10,333,693	-5.9
Pepperidge Farm	\$16,554,004	2.5	3,525,324	-7.2	3,813,243	-7.3
Sara Lee	\$9,175,933	-0.7	1,615,613	-4.8	1,469,190	-4.3
Delizza	\$7,328,584	2.0	1,083,779	-7.1	935,155	-8.2
Private Label	\$6,524,771	21.1	1,170,024	12.1	879,515	18.2
Katz	\$2,612,882	-17.0	476,761	-21.0	267,084	-23.8
Poppies	\$2,441,157	25.9	454,044	12.8	463,372	12.9
Sister Schubert's	\$1,806,814	18.8	377,915	17.8	387,557	12.3
Golden West Cinnabon	\$1,647,381	-43.3	198,332	-46.4	168,326	-45.2
Rhodes Bake-N-Serv	\$1,618,347	-1.4	295,755	-1.3	351,209	-1.3
Great American Cobbler	\$1,407,478	1.7	169,592	-18.7	339,183	-18.7
CORN	\$54,401,852	4.1	27,108,078	-7.2	26,034,684	-5.4

*Product has been in distribution less than a year.



Frozen Rolls & Bread Handbook

2023

Product
Guide
Inside!



Warm & Serve ^{Soft} WHITE ROLLS
Now even fluffier!

President's Message

Kenny Farnsworth serves as the President of Rhodes Bake-N-Serv, a family-owned manufacturer specializing in frozen bread and rolls all produced in the US with domestic labor, ingredients, and packaging.

A note from Kenny:

In recognition of Rhodes Bake-N-Serv's unwavering commitment to excellence and upholding the highest standards, we proudly announce our exceptional achievement of earning a 99% score on the SQF III Audit for the year 2023. This prestigious SQF III certification is a testament to our relentless pursuit of food safety and commitment to quality assurance. It reflects our dedication to adhering to the most stringent industry standards and best practices. This accomplishment serves as validation of our continuous efforts to ensure the safety and satisfaction of our valued customers. It further reinforces our commitment to delivering bakery products that not only tantalize taste buds but also meet the highest standards of quality and safety.

As we look to the future, we are excited to expand the frozen dough category and continue to develop innovative products that make it easier for people to enjoy delicious, home-baked bread and rolls. We are especially excited about the development of our Warm & Serve Rolls, which are designed to meet the needs of convenience-oriented consumers. We are grateful for the support of our customers over the years and are committed to continuing to provide them with delicious, high-quality products that they can feel good about serving their families.

Thank you for choosing Rhodes Bake-N-Serv!

A handwritten signature in black ink, appearing to read "Kenny", is positioned in the bottom right corner of the page.

Rhodes Bake-N-Serv™ through the years

EST. 1958



1958 - Herbert Cecil Rhodes founded Rhodes Bake-N-Serv with the single item of frozen bread dough. Early on, Rhodes adopted the "No-Fault Guarantee" and still follows the statement today.

1960s



1962 - Ken Sr. and Ethel Farnsworth introduce Rhodes to Idaho.

1963 - Ken Jr. & Zoe Farnsworth introduce Rhodes to Utah.

1967 - A three-loaf package of Rhodes Bread cost 69¢.

1970s



1970 - Ken Sr. helps develop and successfully introduce Dinner Rolls.

1975 - Ken Jr. becomes a partner of Champion Bake-N-Serv.

1977 - Rhodes invents bread dough baked in its own package.

1980s



1986 - Rhodes Introduces Cinnamon Rolls.

1986 - Champion Bake-N-Serv acquires Eddie's Bake-N-Serv, Kansas, Oklahoma, Texas and New Mexico from Larry and Eunice Jensen.

1990s



1990 - Kenny Farnsworth, Rhodes' President, joins the company full time.

1990 - Ken Farnsworth, Jr. unites the two remaining franchises with corporate headquarters in Salt Lake City, Utah and plants in Wisconsin and Idaho.

1999 - The Freezer-to-Oven AnyTime!® Rolls are introduced.

2000s



2000 - Rhodes completes new corporate offices in Murray, UT.

2005 - Rhodes adds distribution center to Wisconsin Plant.

2008 - Warm-N-Serv Rolls join the line of Rhodes products: innovative par-baked rolls that bake in minutes.

2010s



2013 - All production moves to the Wisconsin Plant.

2015 - Rhodes expands it's offices at the Wisconsin Plant.

2016 - Rhodes begins a cultural shift, using Arbinger principles.

2016 - High Fructose Corn Syrup and Genetically Engineered Ingredients are removed from the majority of Rhodes products.

2020s



2020 through 2022- Rhodes was able to maintain a **99.4% fill rate** through the pandemic, thanks to our great employees, reliable suppliers and truckers.

Stocking & M

ONE Door Example

Preferred Item placement

Stock Rhodes first, it thaws quickly.

Keep all Rhodes products at 0°F or colder at all times. Stocking in a door is important to maintain product quality. Never leave it out of the freezer while on break.

Always check dates for freshness.

Move items with closest codes to the front. Remove damaged or outdated product from the shelf.

Sweet goods should NOT be on the top shelf, due to sugar content, they thaw more easily.

Double check all sweet goods, they have a shorter shelf life than traditional rolls and bread.

Line-priced items should be grouped together.

Maintain color breaks where possible.

Extra facings of top selling items reduce out-of-stocks.

Bread and club packs on bottom shelf due to weight.



Rhodes' promise is complete satisfaction.

merchandising

TWO Door Example

Preferred Item placement



If for any reason our product does not meet expectations, we will send you a coupon of equivalent value and make every effort to correct the problem in the future.

Contact us at: rhodesbakenserv.com/contact
customersatisfaction@rhodesbread.com
1-800-876-7333

We can also answer questions about baking or check on availability of products in your area.



Product Guide



Thaw, Rise & Bake
Roll Dough



Thaw



Rise 3-5 hours



Bake 15-20 minutes

Shelf life: 9 months Yeast doughs that offer consumers made-from-scratch quality.



Dinner Rolls
6/36 count
1.3 oz rolls



Dinner Rolls
3/72 count
1.3 oz rolls



Texas Rolls
6/24 count
2.0 oz rolls



Gourmet Dinner Rolls
4/60 count
2.0 oz rolls





Thaw, Rise & Bake Bread Dough



Thaw



Rise 3-5 hours



Bake 20-25 minutes

Shelf life: 9 months Yeast doughs that offer consumers made-from-scratch quality.



White Bread
6/3 loaves
1 lb loaves



White Bread
6/5 loaves
1 lb loaves



Pizza Dough
6/3 loaves
1 lb loaves



Sweet Dough
6/3 loaves
1 lb loaves



Thaw, Rise & Bake Sweet Roll Dough



Thaw



Rise 3-5 hours



Bake 15-20 minutes

Shelf life: 8 months Yeast doughs that offer consumers made-from-scratch quality.



Cinnamon Rolls
6/12 count
2.5 oz rolls



Giant Cinnamon Rolls
6/6 count
5 oz rolls



Orange Rolls
6/12 count
2.5 oz rolls



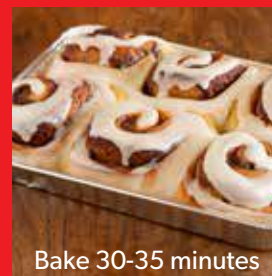


AnyTime!
ready in minutes

SWEET ROLL DOUGH



Place in oven frozen



Bake 30-35 minutes

Shelf life: 8 months Ready to bake frozen dough right from the freezer to the oven and on the table in about 30 minutes.



AnyTime!® Cinnamon Rolls
6/6 count aluminum pan
2.9 oz rolls



0 70022 00779 0



AnyTime!® Sticky Buns
6/6 count aluminum pan
2.9 oz rolls



0 70022 00774 5



AnyTime!® Orange Rolls
6/6 count aluminum pan
2.9 oz rolls



0 70022 00776 9



AnyTime!® Cinnamon Rolls
4/30 count
2.9 oz rolls



0 70022 00789 9



Warm & Serve™ PAR-BAKED ROLLS



Place in oven frozen



Bake 8-15 minutes

Shelf life: 12 months Partially baked and frozen to provide a fresh baked, quality roll in just minutes. They can even be microwaved.



Artisan
French Rolls
6/6 count
1.9 oz rolls



Soft
White Rolls
6/6 count
1.7 oz rolls



Artisan
French Rolls
5/12 count
1.9 oz rolls



Soft
White Rolls
5/12 count
1.7 oz rolls



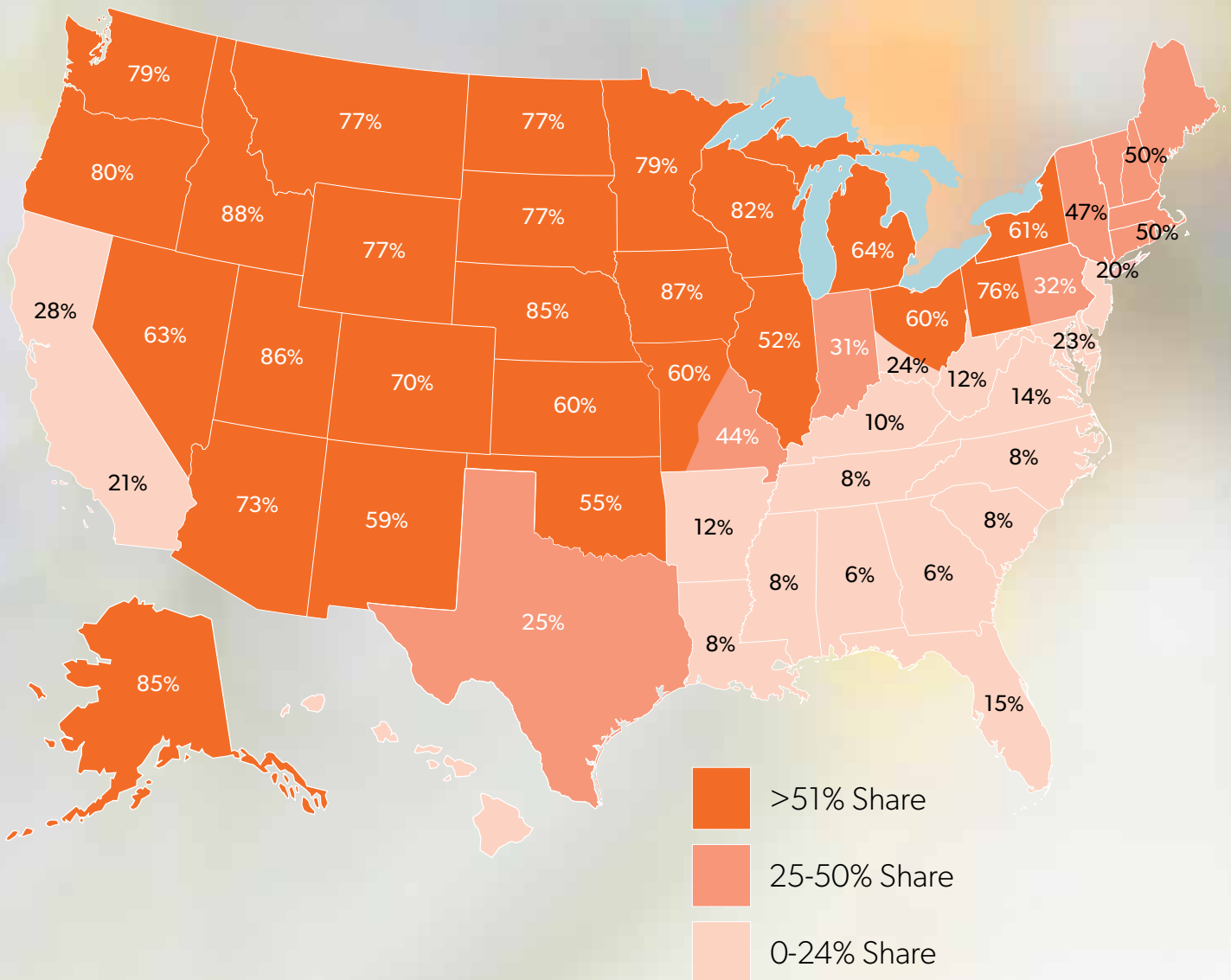
Artisan
Sourdough Rolls
5/12 count
1.9 oz rolls





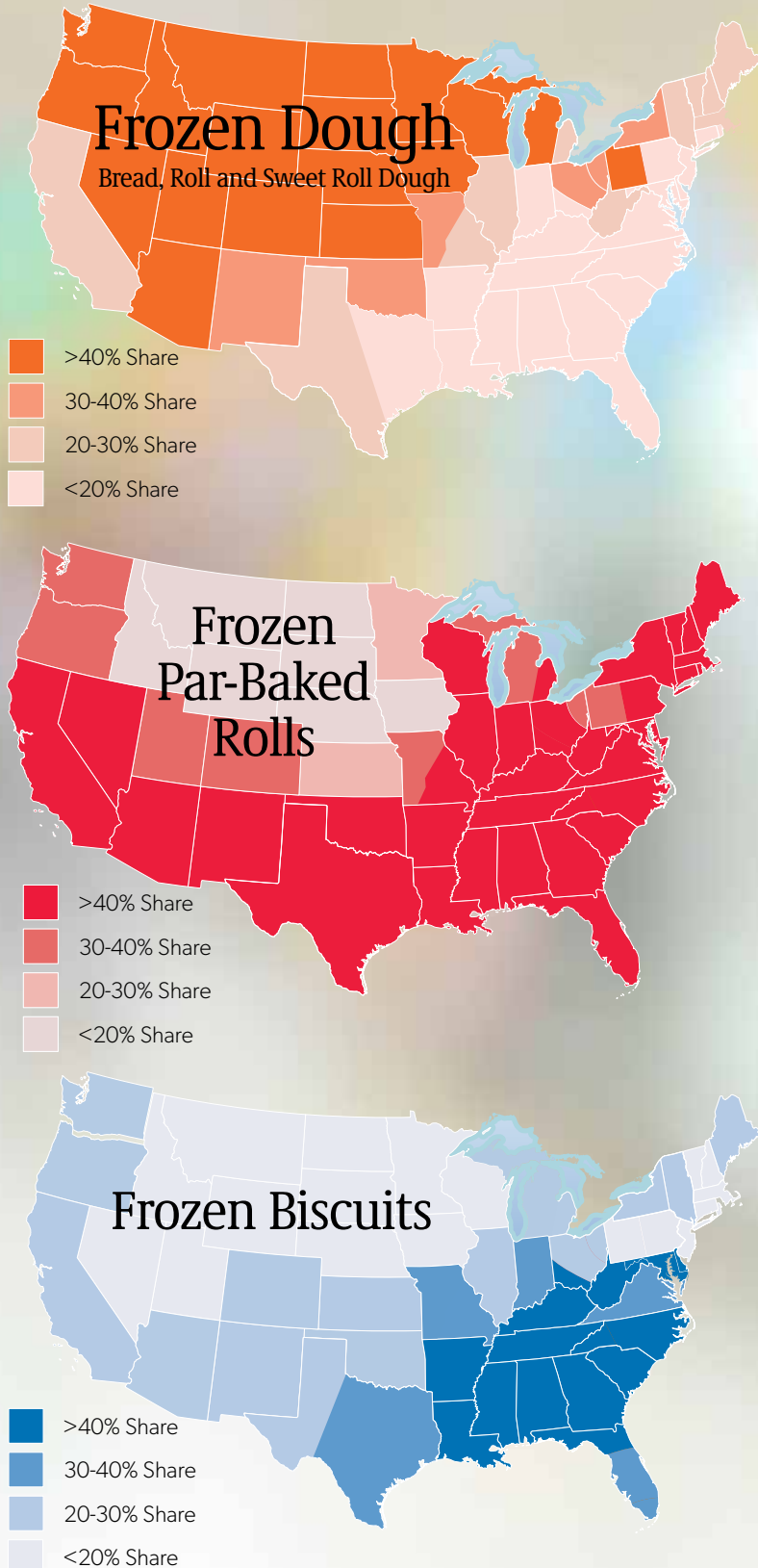
Brand Share

Rhodes is a national brand, with national distribution, and a national following.



Segment Share

The proper allocation of shelf space needed for each category segment.



Market	Dough Share	Par-Baked Roll Share	Biscuit Share
Albany/Schenectady/Troy SMM xAOC	24%	55%	21%
Albuquerque/Santa FE SMM Food	34%	41%	25%
Atlanta SMM xAOC	3%	46%	51%
Austin SMM xAOC	15%	48%	37%
Baltimore SMM xAOC	16%	56%	28%
Baton Rouge SMM Food	6%	45%	49%
Birmingham/Anniston SMM xAOC	2%	46%	52%
Boston/Manchester SMM xAOC	18%	74%	8%
Buffalo SMM xAOC	36%	44%	20%
Charlotte SMM xAOC	5%	49%	46%
Chicago SMM xAOC	24%	48%	28%
Cincinnati SMM xAOC	13%	44%	43%
Cleveland/Akron/Canton SMM xAOC	36%	40%	24%
Columbus OH SMM Food	32%	44%	24%
Dallas/Ft. Worth SMM xAOC	15%	49%	36%
Dayton SMM xAOC	20%	42%	39%
Denver SMM xAOC	44%	35%	21%
Des Moines/Ames SMM Food	75%	13%	12%
Detroit SMM xAOC	26%	44%	30%
Fresno/Visalia SMM xAOC	29%	38%	32%
Grand Rapids SMM xAOC	41%	34%	25%
Greensboro SMM xAOC	5%	48%	46%
Greenville/Spartanburg SMM xAOC	4%	42%	54%
Harrisburg/Lancaster SMM xAOC	27%	51%	23%
Hartford/New Haven SMM xAOC	22%	63%	15%
Houston SMM xAOC	14%	48%	37%
Indianapolis SMM xAOC	17%	44%	39%
Jacksonville SMM xAOC	5%	50%	45%
Kansas City SMM xAOC	38%	32%	30%
Knoxville SMM xAOC	5%	45%	50%
Las Vegas SMM xAOC	37%	39%	24%
Little Rock/Pine Bluff SMM Food	10%	52%	39%
Los Angeles SMM xAOC	23%	53%	25%
Louisville SMM xAOC	6%	46%	47%
Madison WI SMM Food	62%	29%	9%
Memphis SMM xAOC	4%	51%	46%
Miami/West Palm Beach SMM xAOC	7%	67%	25%
Milwaukee SMM xAOC	42%	39%	19%
Minneapolis/St. Paul SMM xAOC	67%	24%	9%
Mobile/Pensacola SMM xAOC	4%	45%	50%
Nashville SMM xAOC	4%	47%	49%
New England Division xAOC	23%	63%	14%
New Orleans SMM xAOC	8%	34%	58%
New York SMM xAOC	13%	72%	15%
Norfolk/Portsmouth SMM xAOC	10%	55%	34%
Oklahoma City SMM Food	32%	38%	29%
Omaha SMM Food	71%	16%	13%
Paducah KY/Cape Gir. MO SMM Food	16%	47%	36%
Philadelphia SMM xAOC	19%	62%	19%
Phoenix/Prescott SMM xAOC	44%	31%	25%
Pittsburgh SMM xAOC	52%	31%	17%
Portland OR SMM xAOC	46%	33%	21%
Providence RI/New Bedford xAOC	26%	63%	11%
Raleigh/Durham/Fayetteville SMM xAOC	6%	53%	41%
Richmond/Petersburg SMM Food	11%	53%	36%
Sacramento/Stockton/Modesto xAOC	26%	45%	29%
Salt Lake City SMM xAOC	74%	18%	8%
San Antonio SMM xAOC	16%	45%	39%
San Diego SMM xAOC	25%	50%	24%
San Francisco/Oakland AOC	15%	67%	18%
Seattle/Tacoma SMM xAOC	46%	31%	23%
St. Louis SMM xAOC	24%	40%	35%
Tampa/Ft. Myers SMM xAOC	10%	50%	40%
Tucson/Sierra Vista SMM Food	44%	32%	24%
Washington DC/Hagerstown SMM xAOC	16%	57%	27%
Yakima/Pasco/Richland SMM Food	54%	26%	20%

Latest 52 Wks - W/E 06/17/23

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MID- & THIRD-TIER REFRIGERATED

BY BESSIE BOVINE



Sales of refrigerated foods in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined hit \$31.83 billion during the 12 weeks

ended Aug. 13, down 0.3% versus the same period a year ago, reports Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. Unit sales fell 2.0% to 7.89 billion.

For the 52 weeks ended Aug. 13, dollar sales shot up 8.0% to \$142.38 billion while units dropped 2.8% to 34.77 billion.

Our chart shows the middle- and third-tier refrigerated subcategories (Nos. 13 to 35 in dollar sales), including the leading brands, for the 12 weeks ended Aug. 13. Note that, instead of reporting sales for multiple individual brands that fall under the same parent brand, Circana is now combining them into a single "brand franchise."

Only brand franchises with at least \$250,000 in sales during the period are listed.

FACTOIDS



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\$557,379

Dollar sales amassed by Natural Bliss oat milk, one of the best performances by a refrigerated product in distribution less than a month (and one of the drivers of the subcategory's 0.4% unit growth).

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
NATURAL CHEESE-SLICES	\$764,804,664	0.7	215,477,047	1.4	120,732,654	1.4
Private Label	\$374,982,942	1.5	119,351,155	1.6	70,394,334	1.8
Sargento	\$193,527,167	-3.7	55,361,011	-0.3	26,807,199	0.2
Tillamook	\$43,103,166	17.4	10,197,794	21.2	5,564,067	16.6
Belgioioso	\$41,525,051	8.1	6,361,953	10.6	5,110,069	6.6
Cracker Barrel	\$14,805,975	-3.8	3,033,225	-10.1	1,694,070	-8.3
Boar's Head	\$14,048,550	-1.2	1,767,826	-8.8	862,952	-8.9
Cabot	\$12,069,403	-2.8	3,372,234	0.0	1,526,560	-0.1
Kraft	\$11,913,222	2.1	3,583,802	7.3	1,717,354	7.0
Galbani	\$10,195,901	10.7	1,864,225	-2.4	1,545,054	-2.1
Crystal Farms	\$8,307,215	-4.1	2,353,881	2.3	1,093,151	-5.5
ORANGE JUICE	\$628,117,039	-4.8	144,707,082	-12.8	8,842,966,376	-14.9
Tropicana	\$180,293,957	-1.1	38,586,832	-6.4	2,212,050,567	-7.8
Simply	\$163,528,452	-5.3	36,491,754	-8.5	1,983,336,615	-8.4
Private Label	\$153,989,287	-3.0	36,088,415	-20.7	2,698,567,140	-23.3
Florida's Natural	\$62,555,302	-5.5	15,438,389	-3.9	948,706,660	-2.6
Minute Maid	\$22,146,389	-19.3	6,531,958	-17.6	385,469,745	-25.1
Homemaker	\$11,819,952	-24.3	3,484,130	-35.0	216,999,053	-32.7
Natalie's	\$6,433,858	-1.6	1,066,497	0.0	50,778,791	-4.1
Uncle Matt's Organic	\$5,584,914	13.0	868,390	3.0	39,264,415	10.8
Citrus World	\$4,449,645	-12.2	2,518,444	-11.6	85,628,889	-12.0
Indian River Select	\$2,993,566	-7.9	618,947	-29.0	26,393,638	-32.1
APPETIZERS/SNACK ROLLS	\$544,389,006	0.9	60,035,351	-3.7	33,313,415	-2.4
AFC	\$214,952,759	3.3	23,084,953	-0.1	12,294,977	0.6
Japanese Food Express	\$59,022,250	3.3	6,392,697	-3.4	3,734,675	-4.4
Fujisan	\$51,316,170	30.2	5,056,420	24.5	3,849,883	26.0
Hissho Sushi	\$42,477,939	3.1	4,915,721	0.5	2,283,553	2.1
Snow Fox	\$31,138,197	8.8	3,477,113	11.0	2,258,481	2.0
Private Label	\$23,771,773	-13.7	2,577,809	-18.5	1,591,794	-7.7
Ace	\$10,934,834	-2.2	1,164,171	-7.2	545,737	-6.8
Samurai Sushi	\$9,258,800	2.8	974,743	1.9	537,770	1.8
Moji Sushi	\$9,170,864	-18.7	1,560,618	-18.2	585,232	-18.2
Sushic	\$8,429,588	-13.1	968,518	-20.7	573,434	-21.9
DINNERS/ENTREES	\$507,366,395	4.8	57,174,170	5.0	74,397,834	8.2
Private Label	\$178,741,286	19.0	21,052,143	17.5	30,541,023	30.9
Hormel	\$46,108,474	-3.3	6,010,182	-7.1	5,736,269	-8.3
Completely Fresh Foods Jack Daniels	\$39,956,220	-2.9	3,953,335	-3.0	4,730,056	-3.4
Giovanni Rana Rana	\$35,856,475	32.5	3,065,168	53.7	5,809,684	19.3
Lloyd's	\$28,467,526	-16.9	2,896,142	-15.7	4,238,909	-14.9
Kevin's	\$19,095,413	35.0	2,049,623	43.2	2,096,055	45.3
John Soules Foods	\$17,678,401	-17.8	2,024,215	-18.5	2,026,835	-15.2
Del Real	\$15,027,816	-8.0	1,404,660	-6.8	1,712,058	-11.5
Curly's	\$14,275,155	5.0	2,031,835	13.7	2,191,253	11.9
Tyson	\$10,005,634	-19.4	617,002	-19.1	2,275,546	-13.9
LUNCH COMBINATION	\$495,742,306	-12.4	216,749,932	-16.9	63,599,412	-15.1
Lunchables	\$333,978,472	-11.8	137,011,064	-17.6	48,791,687	-14.1
Armour	\$59,680,377	3.1	45,597,969	-9.4	7,507,573	-10.6
Hillshire Farm	\$45,379,138	7.6	15,129,044	13.2	2,614,885	13.2
P3	\$18,161,460	-21.5	7,257,583	-30.1	1,173,381	-27.1
Oscar Mayer	\$11,911,932	-24.8	3,824,560	-26.0	789,007	-26.0
Private Label	\$9,987,540	-24.2	3,493,022	-23.3	1,123,221	-14.4
Crunch Pak	\$5,017,495	-72.1	938,602	-84.3	621,242	-64.1
Taylor	\$4,205,593	-6.1	1,376,099	-2.6	505,614	-1.6
Greenfield Natural Meat Co.	\$3,070,143	-18.5	1,081,668	-16.6	206,159	-16.8
BREAKFAST SAUSAGE/HAM	\$488,862,517	-3.9	109,990,279	-4.0	100,725,293	-1.8
Jimmy Dean	\$161,398,138	-5.0	30,428,756	-7.6	29,121,823	-6.0
Private Label	\$63,098,739	5.9	20,524,484	8.5	17,093,551	7.8
Johnsonville	\$61,892,991	-3.0	14,462,272	-1.1	10,692,120	-1.5
Bob Evans	\$36,481,447	0.0	8,504,022	6.0	7,928,465	4.8
Swaggerty	\$32,475,113	0.7	4,477,446	22.9	9,347,828	26.2
Odom's Tennessee Pride	\$21,164,391	-13.3	3,970,813	-17.9	4,914,564	-16.6
Butterball	\$11,960,893	1.9	2,880,891	-3.1	1,742,958	-3.1



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-2.6%

Unit loss by teas, despite an 11.0% gain by No. 1 brand Milo's. Eight of the remaining top 10 saw their unit sales fall — five by double digits.

-3.8%

Unit loss by cream cheese bricks. However, both soft cream cheese (+2.0%) and whipped cream cheese (+5.5%) saw their unit sales grow.

96%

Percentage of pet custody cases that involve dogs. Only 1% involve cats.



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1.9%

Unit gain by natural cheese. Seven of nine subcategories registered unit growth, including biggest gainer grated cheese (+11.3%). Only cubes and string cheese saw units fall.

3

Number of refrigerated subcategories that moved more than 50% of volume with merchandising support: eggs, processed/imitation cheese loaf and prepared salad/fruit/coleslaw.

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
Smithfield	\$11,793,355	-9.2	3,337,599	-5.6	2,030,935	-11.5
Hatfield	\$8,784,935	2.2	2,944,416	3.3	1,640,379	3.9
Owens	\$8,594,061	-10.6	1,981,004	-7.5	2,207,165	-6.7
PROCESSED/IMITATION CHEESE-SLICES	\$477,872,656	-0.4	107,775,382	-2.6	105,310,358	-2.2
Kraft	\$265,072,813	-1.2	47,527,631	-5.1	49,143,566	-5.2
Private Label	\$113,923,828	3.3	35,213,639	5.0	36,448,756	4.8
Velveeta	\$31,406,009	-15.5	8,590,820	-22.9	7,236,048	-20.8
Borden	\$21,818,968	17.9	7,102,599	10.2	5,218,767	10.6
Land O'Lakes	\$8,015,885	2.1	1,183,180	-2.3	1,530,880	-0.8
Boar's Head	\$6,426,020	4.7	830,128	-3.8	415,066	-3.8
Violife	\$4,082,933	18.6	776,621	11.9	353,642	11.2
Crystal Farms	\$3,601,306	11.9	841,825	18.6	809,247	15.1
Field Roast	\$3,234,499	0.4	583,865	3.0	255,441	3.0
Follow Your Heart	\$2,662,836	-29.7	516,555	-31.7	225,993	-31.7
PREPARED SALAD/FRUIT/COLESLAW	\$460,576,393	3.5	99,617,212	-3.1	144,120,633	-1.1
Private Label	\$310,310,725	4.3	68,375,790	-0.3	103,774,821	0.7
Reser's	\$66,167,737	9.1	12,533,843	3.7	20,696,994	2.9
Del Monte	\$21,929,839	-6.1	6,627,731	-25.4	7,227,075	-6.2
Hans Kissele	\$6,428,502	-10.0	1,273,229	-10.6	1,604,939	-7.5
Grandma's	\$5,871,905	-8.8	886,341	-17.0	1,300,932	-19.3
Mrs. Gerry's	\$4,315,177	-1.6	600,971	-9.5	1,066,888	-9.5
Simply Fresh	\$3,698,606	-42.4	743,927	-41.4	267,908	-42.1
Zina's	\$3,471,257	79.1	583,582	78.6	438,177	76.4
Taylor	\$3,460,633	-39.8	678,937	-59.6	550,665	-78.8
No Brand	\$2,974,944	16.6	542,654	13.0	396,190	13.2
DIPS	\$398,659,195	0.1	94,419,075	-3.3	78,711,564	-3.2
Private Label	\$100,452,868	-4.2	22,569,778	-7.5	20,272,014	-9.5
Wholly	\$38,414,767	-6.9	7,359,383	-11.5	4,819,793	-11.4
Dean's	\$26,346,964	5.0	10,614,123	7.4	10,431,452	8.0
Heluva Good	\$24,927,825	10.4	9,888,948	7.3	8,711,879	6.3
Marzetti	\$20,903,630	-2.8	4,598,773	-11.1	3,961,786	-9.9
Sabra	\$13,655,822	-27.2	2,886,213	-29.9	1,358,746	-37.7
Gordo's	\$12,277,575	26.9	2,277,151	24.4	2,285,186	23.3
Yucatan	\$11,725,617	-2.8	2,255,378	-2.9	1,821,545	-2.6
La Terra Fina	\$9,824,047	-2.5	1,900,974	-3.9	1,286,287	-4.5
Rojo's	\$6,150,812	4.4	922,175	4.3	1,288,269	0.4
MARGARINE/SPREADS	\$377,813,439	4.9	101,954,433	-3.0	143,664,363	-2.4
Shedd's	\$138,794,664	4.4	26,959,684	-1.8	55,679,790	-2.0
I Can't Believe It's Not Butter	\$69,448,632	-3.0	14,406,910	-7.6	15,790,673	-8.3
Imperial	\$41,590,550	24.4	22,059,856	15.1	27,058,679	16.5
Blue Bonnet	\$40,989,881	25.5	18,251,810	-6.0	22,718,948	-6.6
Smart Balance	\$22,644,215	-6.7	4,075,066	-19.3	5,283,350	-17.5
Earth Balance	\$14,821,652	-12.6	2,339,730	-23.8	2,129,024	-24.1
Private Label	\$14,469,653	21.8	4,065,074	9.4	6,392,426	9.3
Parkay	\$12,843,390	5.2	4,001,111	-6.9	3,528,056	-7.4
Brummel & Brown	\$6,693,526	0.7	1,506,726	-6.0	1,412,556	-6.0
Land O'Lakes	\$5,950,204	-12.2	1,834,344	-31.4	1,771,613	-32.7
SOUR CREAM	\$362,567,018	6.7	140,112,773	0.0	141,132,086	-0.3
Daisy	\$211,834,939	8.2	73,680,455	0.2	75,331,095	-0.5
Private Label	\$96,813,711	4.0	47,726,196	-0.2	47,819,371	-0.1
Breakstone's	\$10,078,288	4.6	4,868,690	4.9	4,371,414	3.7
Knudsen	\$7,339,472	6.0	2,525,670	-0.6	2,728,878	-0.3
Cacique	\$5,977,779	27.8	1,540,788	20.3	1,402,728	19.0
Hood	\$2,955,771	4.5	1,194,640	-0.6	1,131,491	-2.0
Lala	\$2,631,265	41.7	633,642	17.5	870,227	25.1
El Mexicano	\$2,319,447	9.0	589,621	2.3	567,213	2.0
Kemps	\$1,507,555	-11.0	645,382	-14.5	595,791	-15.2
Tillamook	\$1,343,605	5.5	528,655	-6.9	563,783	-6.1
TEAS	\$346,751,425	6.8	119,159,485	-2.6	10,389,325,727	-1.7
Milo's	\$121,346,659	19.7	41,800,157	11.0	3,984,665,370	15.7
Gold Peak	\$59,057,107	1.1	19,009,691	-6.4	1,223,385,922	-6.6
Private Label	\$53,704,031	9.7	19,376,047	-0.3	2,055,264,334	-4.3



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8

Number of top 20 refrigerated subcategories that recorded unit growth, including biggest gainer dinners/entrees, up 5.0%.



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1.8%

Unit gain by pasta, thanks to top seller Giovanni Rana's 10.0% advance. The rest of the top 10 registered unit losses.

40.6%

Dollar gain by private label all other meat/cheese/cracker/desserts (to \$10,651,534), most by a store brand refrigerated product with at least \$10 million in sales.



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1,400%

Increase in the concentration of bacteria on a cake after blowing out birthday candles.

10

Number of top 20 refrigerated subcategories that registered dollar losses, including biggest loser fresh eggs (-21.8%).

-16.9%

Unit loss by No. 17 lunch combinations, biggest by a top 20 refrigerated subcategory (though No. 14 orange juice, -12.8%, wasn't far behind).

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
Turkey Hill	\$31,181,549	-4.6	11,708,720	-20.8	1,054,001,135	-17.1
Red Diamond	\$28,657,695	-9.9	9,013,189	-19.2	1,081,470,635	-17.8
Pure Leaf	\$8,115,450	-22.4	2,567,906	-22.4	158,936,795	-28.8
Bolthouse Farms	\$7,374,690	-19.8	1,629,237	-27.9	46,749,704	-22.1
POM	\$5,775,761	2.1	3,092,781	-2.0	42,128,046	3.3
Tazo	\$4,865,295	-38.8	1,307,029	-45.9	54,893,760	-41.4
Swiss Premium	\$4,508,738	5.0	1,936,000	2.1	185,544,820	0.5
ALMOND MILK	\$343,706,365	-6.1	90,181,598	-11.3	393,106,090	-11.0
Blue Diamond	\$141,873,490	4.8	33,538,582	-0.6	156,489,171	-1.2
Silk	\$98,883,371	-22.2	23,862,285	-28.4	110,427,853	-26.9
Private Label	\$70,320,876	4.2	25,603,362	-1.1	106,674,939	-0.3
Califia Farms	\$23,990,719	5.5	5,385,562	0.2	16,416,918	1.3
Malk	\$3,283,578	301.0	609,130	338.9	1,065,977	338.9
Remedy Organics	\$2,845,128	34.6	645,429	36.1	488,268	36.7
Mooala	\$1,203,034	22.3	248,885	3.7	746,654	3.7
Three Trees	\$502,450	33.4	67,729	19.6	118,526	19.6
Hiland	\$453,467	-22.9	132,825	-25.4	531,300	-25.4
NATURAL CHEESE-STRING/STICK	\$341,381,534	2.2	64,871,910	-2.4	57,777,692	1.4
Private Label	\$118,234,280	6.7	24,792,860	3.0	24,127,940	7.0
Frigo	\$88,641,260	1.0	12,984,640	-7.6	15,141,145	-0.9
Sargento	\$47,176,897	-4.0	9,619,741	-6.4	5,821,369	-9.1
Galbani	\$18,257,419	11.9	3,272,472	14.2	2,918,141	15.2
Kraft	\$16,321,278	11.1	3,454,323	2.5	2,619,406	12.9
Schreiber	\$12,196,726	-3.9	2,826,642	-3.5	1,830,202	-3.4
Polly-O	\$11,033,030	-20.1	1,684,656	-30.8	1,635,892	-24.8
Cracker Barrel	\$7,610,249	11.2	1,740,919	8.2	790,168	9.3
Crystal Farms	\$6,860,773	-2.7	1,436,830	-7.3	1,096,948	-8.2
Baker	\$2,787,351	0.2	416,884	-11.8	455,332	-12.0
FRUIT DRINK	\$336,300,241	9.3	129,768,294	1.9	7,438,833,002	-0.2
Minute Maid	\$96,745,835	21.7	48,841,225	10.2	2,836,421,686	7.3
Tropicana	\$64,344,879	4.4	21,039,270	-8.3	1,095,769,115	-10.1
Simply	\$46,989,414	17.8	15,910,004	14.1	812,627,246	15.1
Sunny Delight	\$46,028,753	3.3	17,465,122	-1.1	1,608,417,459	-7.8
Welch's	\$22,929,797	9.5	7,261,030	-4.6	428,400,776	-4.6
Suja	\$13,060,545	-7.6	3,660,426	-6.9	24,408,104	-4.0
Kevita	\$8,046,563	-18.1	2,484,241	-20.1	39,370,137	-19.2
Private Label	\$7,776,191	6.3	3,042,035	3.9	173,595,968	11.9
Florida's Natural	\$3,480,121	29.8	1,431,769	16.5	83,646,511	17.2
Bolthouse Farms	\$2,310,007	-39.6	574,626	-46.9	13,212,316	-38.4
COTTAGE CHEESE	\$327,706,573	16.9	109,681,758	11.1	126,788,583	11.3
Private Label	\$115,181,500	12.1	41,497,813	7.5	59,466,660	8.5
Daisy	\$59,415,032	27.3	20,289,778	27.0	19,826,580	23.0
Breakstone's	\$33,152,911	21.8	13,507,534	6.3	10,403,436	19.2
Good Culture	\$22,180,558	77.7	7,605,203	47.1	5,211,357	65.2
Hood	\$17,857,104	17.6	5,706,040	14.2	5,134,243	11.9
Knudsen	\$15,344,874	4.6	4,928,951	-2.8	4,912,020	2.7
Prairie Farms	\$11,959,075	6.2	2,634,949	4.5	4,119,682	6.1
Hiland	\$9,448,906	8.9	2,286,751	7.5	3,498,466	8.6
Kemps	\$8,958,552	19.0	2,831,197	12.2	3,345,682	16.5
Darigold	\$4,934,900	7.8	1,049,842	-14.0	1,673,482	-14.7
LEMONADE	\$300,232,476	0.4	109,604,564	-7.6	6,393,726,814	-3.2
Simply	\$171,392,898	-0.9	57,387,343	-4.4	3,193,957,167	-1.8
Private Label	\$34,515,968	-15.8	15,696,066	-29.6	835,892,451	-19.9
Minute Maid	\$34,415,095	12.5	15,280,732	3.2	848,689,991	2.3
Milo's	\$17,223,914	46.8	5,544,585	26.5	519,684,353	35.3
Florida's Natural	\$12,127,998	-5.3	4,800,233	-9.6	283,209,491	-9.6
Turkey Hill	\$8,090,059	-11.9	3,080,359	-26.8	259,377,611	-22.6
Newman's Own	\$5,141,558	-22.1	1,655,603	-30.0	97,680,592	-30.0
Tropicana	\$4,562,499	170.8	1,678,224	113.9	83,015,137	118.1
Mayer Bros.	\$1,978,423	19.0	641,033	14.5	38,303,574	6.1
Welch's	\$1,075,037	-28.1	352,025	-35.3	20,769,453	-35.3
READY-TO-DRINK COFFEE	\$279,453,552	3.7	50,992,614	-6.0	2,448,762,262	-6.0

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5.8%

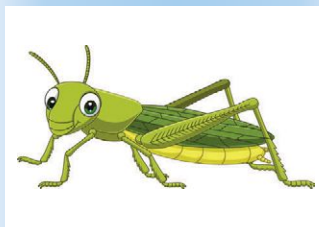
Unit gain by non-aerosol whipped topping. Sales of aerosol whipped topping, on the other hand, fell 3.4%.

-10.5%

Dollar loss by bacon (to \$1,285,368,108), the second-largest refrigerated subcategory (after eggs) to post a double-digit decline. However, moderating prices pushed units up 1.8%.

1

Number of times a child actually died after ingesting poisoned Halloween candy. However, it was given to him by his own father, who had recently taken out a \$40,000 life insurance policy on his son.



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72%

Protein content in grasshoppers, which also contain all essential amino acids — and no saturated fat or cholesterol. Beef is only 27% protein.

19.9%

Dollar gain by cookie/brownie dough (to \$150,098,327), thanks to double-digit (or better) advances by the top five brands. But units were up only 2.3%, suggesting some significant price inflation.

SUBCATEGORY	\$ SALES	% CHG	UNITS	% CHG	VOLUME	% CHG
Starbucks	\$115,993,249	2.8	18,813,252	-10.8	840,207,426	-12.3
Stok	\$75,693,628	30.7	13,379,264	23.3	642,204,656	23.3
International Delight	\$44,267,548	-4.9	9,542,742	-11.0	610,735,457	-11.0
Califia Farms	\$14,908,490	-6.9	2,875,922	-14.8	136,707,508	-11.7
La Colombe	\$8,181,239	39.1	1,748,989	44.5	73,457,522	44.5
Bizzy	\$5,494,545	63.6	1,005,278	59.4	48,253,361	59.4
Private Label	\$4,638,367	35.4	933,894	27.3	42,305,757	25.6
Bolthouse Farms	\$4,629,536	-13.4	1,368,499	-18.4	23,309,746	-18.9
Pop & Bottle	\$649,098	45.7	205,365	49.4	1,715,617	46.8
Coca-Cola	\$379,169	-96.9	71,617	-97.2	2,885,625	-97.5
CREAM CHEESE-SOFT	\$274,146,612	3.5	68,631,177	2.0	41,824,059	1.4
Philadelphia	\$178,329,165	-0.9	33,550,052	-6.3	22,320,283	-6.2
Private Label	\$69,599,657	17.4	28,890,803	13.5	16,314,124	14.0
Tillamook	\$7,162,227	18.9	2,045,802	35.0	895,038	35.0
Belgioioso	\$5,355,948	7.6	996,488	2.3	527,308	2.8
Kite Hill	\$2,561,481	-27.7	399,990	-28.0	199,995	-28.0
Violife	\$1,992,932	33.7	398,375	33.3	185,352	40.8
Crystal Farms	\$1,445,472	-6.6	487,150	-11.9	245,326	-12.1
Tropical	\$769,990	23.1	237,315	20.4	237,315	20.4
Miyoko's Creamery	\$733,429	-7.2	135,641	-7.4	67,821	-7.4
Tofutti	\$625,831	-29.9	141,259	-33.2	70,629	-33.2
DAIRY HALF & HALF	\$264,759,967	6.2	76,408,191	-0.8	155,898,744	-0.4
Private Label	\$163,291,821	9.6	50,627,429	0.7	109,145,174	1.1
Land O'Lakes	\$34,988,224	1.8	9,349,464	-2.1	19,464,548	-1.2
Horizon	\$14,737,186	1.0	3,135,693	-2.8	4,905,142	-3.1
Organic Valley	\$13,014,740	6.8	2,777,614	3.3	4,258,579	1.8
Hood	\$5,760,113	-0.8	1,588,536	-7.3	2,879,454	-5.4
Darigold	\$3,096,449	-18.2	701,317	-20.0	1,598,731	-23.6
Knudsen	\$2,804,033	6.6	640,372	-2.4	1,100,505	-3.0
Shamrock	\$2,544,923	14.8	672,945	3.2	1,217,907	3.8
Clover Sonoma	\$1,998,952	3.3	490,097	-7.3	767,695	-6.4
Kemps	\$1,942,840	15.6	680,691	10.6	1,033,197	17.1
NON-AEROSOL WHIPPED TOPPINGS	\$260,833,013	16.5	57,236,015	5.8	81,100,737	9.3
Private Label	\$192,405,158	18.6	44,349,864	5.6	66,518,187	10.0
Horizon	\$15,833,661	12.1	2,549,645	5.7	2,549,645	5.7
Land O'Lakes	\$11,661,425	13.2	2,541,095	16.2	3,079,830	11.5
Organic Valley	\$6,506,463	20.2	1,118,520	14.8	1,118,352	14.8
Kemps	\$3,600,117	14.0	658,763	7.3	846,909	19.2
Darigold	\$2,412,658	-2.2	443,686	-15.4	531,184	-16.1
Dairy Pure	\$2,078,648	-27.7	412,236	-38.8	539,851	-29.0
Prairie Farms	\$2,052,040	-8.0	303,257	-15.4	397,044	-10.6
Clover Sonoma	\$2,000,591	2.2	366,035	-4.9	367,334	-6.0
Shamrock	\$1,996,475	17.3	294,855	-1.2	453,682	6.7
PUDDING/MOUSSE/GELATIN/PARFAITS	\$249,540,190	1.7	83,665,319	-11.2	79,613,515	-8.4
Jell-O	\$75,355,122	3.1	23,068,324	-5.2	22,871,284	-4.3
Kozy Shack	\$48,263,464	3.3	11,364,895	-16.8	16,231,683	-17.0
Private Label	\$31,508,710	0.4	16,853,858	-15.5	8,496,782	-18.1
Senor Rico	\$13,082,470	-1.7	7,890,560	-0.2	5,171,351	2.0
Raymundo's	\$12,876,914	-6.0	3,583,101	-13.3	6,378,379	-5.5
Winky	\$9,499,353	3.3	2,678,583	2.3	6,710,871	3.0
Clio	\$9,209,210	59.4	1,901,646	-29.8	896,636	52.6
Philadelphia	\$8,126,568	11.1	1,600,932	2.2	1,433,346	13.5
Kraft	\$6,209,237	-37.0	2,293,048	-39.5	1,359,938	-32.1
Patti's Good Life	\$4,400,037	-4.7	1,018,069	-10.1	821,430	-8.7
FLAVORED MILK	\$247,710,383	-0.7	82,380,224	0.5	285,696,310	-0.7
Private Label	\$81,737,433	-5.8	29,932,180	0.3	140,609,363	-0.6
Fairlife	\$40,094,287	32.0	8,902,916	26.5	28,933,477	26.5
Prairie Farms	\$13,623,718	5.1	4,967,429	6.8	14,298,217	7.6
Hiland	\$11,203,222	17.2	4,588,199	22.1	11,547,342	18.8
TruMoo	\$9,739,840	-13.5	2,951,643	-11.4	11,433,850	-12.3
Promised Land	\$7,743,708	-26.8	1,680,051	-37.4	3,716,962	-31.3

*Product has been in distribution less than a year.

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NATURAL GROCERS: NO TRADE-OFFS REQUIRED

The expansion-minded 164-store chain offers frozen foods that are both convenient and high quality — including a unique, value-added meal program.

BY CHRISTINE BLANK

Lakewood, Colo.-based Natural Grocers has capitalized on growing demand for healthy, sustainable foods by offering a wide variety of natural, organic, sustainable and plant-based frozen and refrigerated SKUs.

“When shopping for frozen food, it can sometimes feel like you’re choosing mediocre food, or choosing convenience over quality. Not with us. Unlike other stores, our frozen food isn’t inferior food, and convenience and quality are one and the same,” says category manager of frozen and refrigerated Missy Davis-Hood. “When stocking

‘When shopping for frozen food, it can sometimes feel like you’re choosing mediocre food, or choosing convenience over quality. Not with us....Our frozen food isn’t inferior food, and convenience and quality are one and the same.’

our freezers, we emphasize organic, non-GMO, local and naturally raised items,” she explains, pointing to products such as organic grass-fed meats, antibiotic-free poultry, humanely raised pork, fresh-caught fish, and organic fruits and vegetables.

As a result of Natural Grocers’ strict sourcing standards and humane/environmental health-focused philosophy, the operator of 164 stores in 21 states has enjoyed steady growth. In fiscal 2022, it opened three new stores, including its first in South Dakota. But the company has already signed leases for five more stores, expected to open in fiscal 2023 and beyond.

“Beyond fiscal year 2023, we would expect to increase the number of new store openings per year to between six and eight as construction and supply chain conditions improve,” says Hood.

Will new stores include more space for frozen foods?

Probably not, she says, citing Natural Grocers’ small, 13,000- to 14,000-square-foot stores. But the chain does a bang up job merchandising frozen foods in the space it has, devoting 24 feet to ice cream, 12 feet to meats and 36 feet to other frozen foods. Some of that space is reserved for a unique frozen meal program.



Among the newest additions to the Natural Grocers private label lineup is value-added frozen seafood.

The chain’s good4u Seafood Meals in Minutes, launched a year ago, allow shoppers to mix and match pre-seasoned, ready-to-cook frozen seafood, side dishes and vegetables. Customers can select one of four varieties of Natural Grocers frozen seafood: Blackened & Smoked Butter Cod, Lemon & Herb Butter Cod, Sweet Chili Shrimp, and Garlic & Herb Butter Shrimp. They can also choose from nine different Mediterranean-inspired side dishes and a “large selection” of the chain’s private label frozen vegetables, according to the retailer’s website.

Particularly in seafood, the company’s philosophy is to offer primarily frozen and very little refrigerated, says dairy and meat category manager Leigh Paone. For consumers, she explains, buying frozen fish is often cheaper and can be just as good as or better than some “fresh” fish — “a lot of which is previously frozen to begin with.”

CONVENIENCE IS HOT, PLANT-BASED IS NOT

In both frozen and refrigerated, convenience sets are experiencing the most growth, and handheld items that

are quick to prepare and can be consumed on-the-go are trending up, reports Hood. Frozen burritos, ready-to-bake or -eat cookie dough, cashewmilk yogurt pouches, and dairy-free salad and sandwich offer-

ings are especially hot, she reports. What’s cooling off? Plant-based growth. “It’s a category that is experiencing oversaturation after a long period of pent-up demand,” explains Hood. “So although we still add new items, it is not a focus.”

The chain has added several new frozen items to its Natural Grocers private label program in the past year, including frozen prepared seafood, pizza, handheld burritos ▶

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- ▶ and snack foods, says Hood.

In addition to natural, organic and sustainable items, local products are valued and prioritized in Natural Grocers stores, according to the company's website. "We get our hands on as much of it as meets our quality standards," says the retailer. It calls out featured local items with "I'm Local" shelf tags and promotes local brands during events such as Colorado Day and Texas Independence Day, says Hood.

HOW TO SELL TO NATURAL GROCERS

While Natural Grocers is first-to-market on many products, including CocoYo coconut yogurt and kombucha from Vernon, Calif.-based GT's Living Foods, the retailer also carries a healthy assortment of "familiar" brand names that have been staples since the company opened its first store in 1995, says Hood.

Natural Grocers' buyers review new items monthly and follow the retailer's strict product standards, including no genetically modified organisms (GMOs). In addition, "Certified organic is always top of our list when we're checking out new products," says the company on its website. "The authenticity and environmental benefits are unparalleled, and [organic is] also naturally GMO-free."

New items with ingredients at high risk of coming from GMOs must be organic or must be verified as non-GMO, adds the retailer. "If a company cannot provide confirmation, we will not carry the product."

"We suggest reviewing our standards prior to submit-



Convenience sets, including handheld items that can be enjoyed on the go, are seeing the most growth.

ting new items," says Hood. "We review all ingredients, manufacturing and processing practices so our customers can be confident about their food choices." Frozen and refrigerated suppliers who believe their products are a good fit for Natural Grocers should complete a Vendor Submission, she adds.

What else does the retailer look for? Natural Grocers buys only conscientiously and humanely raised meats without antibiotics, hormones or other growth promoters and only certified organic produce. "It's the only kind we carry, and we're pretty sure we're the only largish grocery chain to do it," it says on its website. Plus, eggs must be free-range, and the chain sells only pasture-raised dairy and pasture-based dairy products.

In addition, Natural Grocers prioritizes fair-trade certifications and sustainability — from compostable packaging to water re-circulation to root-to-stem innovations. "We love food that is as good for the planet as it is delicious," says the retailer. Buyers are also big on transparency because "shopping for food should not require looking up ingredients in the dictionary."

Beyond that, the chain will not carry any products with hydrogenated oils, artificial colors, artificial flavors, artificial preservatives or artificial sweeteners. And irradiated foods are a no-no because they are "subjected to radioactive rays that reduce nutrients and cause potentially problematic chemical changes," says the company. Natural Grocers ensures irradiated foods "aren't sneaking into your grocery cart along with your groceries, especially the herbs you choose to add zest to your favorite recipes," it says. "Most conventional herbs found at online retailers, other grocery stores, and farmers' markets are irradiated." ■



Certified organic items are given priority, eggs must be free-range, and the chain sells only pasture-raised dairy.

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IT'S TIME TO DISCUSS THE BENEFITS OF FOOD PROCESSING

Yes, it's processed, but frozen food brings a lot to the table. Policymakers need to be aware.

BY **ALISON BODOR**,
PRESIDENT AND CEO,
AMERICAN FROZEN FOOD INSTITUTE



Alison Bodor

Turn on the news today and it is increasingly likely that you will see a headline about food processing, nutrition and health. This has become a hot topic among policymakers, regulators and those who shape our country's nutrition guidance here in Washington. For example, the Dietary Guidelines Advisory Committee (DGAC), which makes recommendations for the federal government's *Dietary Guidelines for Americans*, is currently examining the rela-

Frozen Food Institute (AFFI) provided comments to the committee in which we stressed that there is no consensus on defining levels of food processing, and, therefore, it is challenging to study how different levels of food processing impact diet and health. We urged the DGAC to avoid crafting recommendations to the federal government that reference food processing levels and to recognize the many benefits of food processing in its report.

Research conducted by AFFI, including our biennial Power of Frozen in Retail, finds that consumers link frozen food to convenience, ease of preparation and time savings. These product attributes are specifically made possible because of freezing. This natural processing step allows for a longer shelf life and helps families save time on meal planning and preparation.

The freezing process is a vital method in food manufacturing that locks in the freshness and nutrients of foods and makes frozen foods accessible year-round throughout the nation, including in food deserts and remote areas.

The steps taken to produce frozen foods also ensure the safety of frozen products. For instance, blanching, baking, and extruding are all heat processes that inactivate food-borne pathogens and ensure the safety of frozen foods.

Food processing practices such as freezing lead to less food waste, which in turn means added financial savings for consumers. With their extended shelf life and pre-portioned servings, frozen foods allow households to only prepare what they need and save the rest for later use. This can be especially helpful for food with a shorter shelf-life, such as proteins or produce. In a 2022 study conducted by AFFI, consumers reported that frozen food helps them reduce their waste and save money, and that having frozen meal ingredients on hand helps to have more food in the house without risk of spoilage.

AFFI is committed to communicating with audiences the many ways that the frozen food category positively shapes our lives, all made possible thanks to food processing, and is engaging with policymakers, thought influencers and our partners across the food chain to share the benefits of frozen food.

As dialogue and debate about food processing continue, frozen foods will further play a positive role in shaping a healthier future and bring value to the lives of consumers. Now is the moment for our industry to discuss and share our winning attributes, and ultimately support building a marketplace that promotes category success. ■

The American Frozen Food Institute is the member-driven national trade association representing all segments of the frozen food supply chain, from manufacturers to suppliers and distributors.

AFFI is committed to communicating with audiences the many ways that the frozen food category positively shapes our lives, all made possible thanks to food processing.

tionship between so-called "ultra-processed" foods and health outcomes. With the next set of guidelines set to be released in 2025, the *Dietary Guidelines for Americans* is the government's guiding nutrition recommendation and shapes national consumer programs such as MyPlate and the National School Lunch Program. Any recommendations from this committee can have a big impact on nutrition policy.

WHY IT MATTERS

These conversations on food processing also matter to your business — whether or not you operate inside the Beltway. Legislative and regulatory developments can shape regulatory and marketplace developments such as labeling claims, front-of-pack requirements, market entry opportunities, or social media dialogue and consumer perceptions. For example, three in four of consumers recently surveyed said they consider if a food is processed when shopping, and six in 10 try to avoid these items.

As the voice of the frozen food industry, the American



Consumers say frozen food helps them reduce waste and save money.



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REINVENTING PLANT-BASED

Plant based chicken was scarce but mushrooms were popping up at the Plant Based World Expo.

BY DON STUART

Plant-based is certainly in the crosshairs of a revolution. The question is, will it wilt or be reinvented?

Research alone may provide a myopic view of the future, but when combined with manufacturer investment, it often indicates what we can expect in the next few years.

A recent trip to the Plant Based World Expo, and our expectations from Expo East, indicate that growth will be very selective. It will be important for manufacturers and retailers to focus on the right shoppers and the right categories to achieve success in plant-based.

3 SHOPPER SEGMENTS

Cadent’s 2023 recently released research report, “Sowing the Future: The Plant-based Revolution” indicates that plant-based shoppers can be segmented into three types: Loyalists, Lapsed Buyers, and Hold-outs.

Loyalists are seeking the benefits of healthy, environmentally friendly, and ethical treatment of animals. These are key reasons they remain committed to the concept of plant-based categories. Of course, plant-based products must deliver on taste and texture at a reasonable price. Taste is No. 1 as it is in most food and beverage categories.

Lapsed buyers have departed the category but were never as motivated by the core reasons of health, environment and ethical treatment. These lapsed buyers were primarily driven by a desire to try something new or motivated by a recommendation.

Hold-outs typically have a lower economic and educational profile with incomes under \$40K.

Motivation	Loyalist Plant-based Meat Shopper (Indexed)
Healthier	135
Environmental concerns.....	128
Humane treatment of animals	124
Buying brands that align with values	121



Mushroom-based products — at least in the case of meat analogs — can offer great taste and a much cleaner label.

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Motivation	Loyalist Plant-Based Milk Shopper (Indexed)
I am lactose intolerant/reducing my consumption of dairy	184
I do not like the conventional dairy version.....	129
I think they are better for me than traditional dairy products	107
I think they are healthier than traditional dairy products.....	103

The data clearly supports the strong, but distinct, motivating factors among Loyalists both of plant-based meat and milk analogs.

Plant-based milk buyers have motivations beyond the core, driven by allergies or intolerance to consumption of dairy. We believe that plant-based milk will continue ▶



Green Island, N.Y.-based MyForest has won national media recognition for its MyBacon, made from cultivated gourmet mushroom roots.

Photos by Don Stuart



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FOUR MERCHANDISING TIPS

1. Invest in growing categories such as creamers; prune and improve plant-based meat.
2. Target plant-based meat products that offer better taste, cleaner labels, and attractive pricing.
3. Reinvent with mushroom magic that can deliver on taste with a clean label.
4. Target lapsed buyers who represent approximately 1/3 of all buyers. Ostensibly it may be easier to reattract lapsed buyers than convert non-buyers, but both should be targets.



Plant-based cheese is showing up in a growing number of products, such as pizza.

- ▶ to grow and have a clear reason to be. Plant-based meat needs to be reinvented.

Lapsed buyers are the most often cited as the primary contributors of declines across plant-based, especially in meat. The three biggest reasons for Lapsed Buyers not repurchasing are:

Reason for Lapsed Buyers not repurchasing plant-based items	% of Lapsed Buyers responding attribute was influential in not repurchasing
Too Expensive.....	63%
Did not like taste	59%
Did not like texture	51%

This group will be difficult to re-attract, but not impossible. Inflation has certainly impacted animal-based as well as plant-based products. However, plant-based products are generally beginning at a higher price point.

Among Hold-outs, a large portion of this segment is content with current animal-based product consumption and feels little need to try or switch to plant-based alternatives. Key reasons for not trying include taste, price and flavor.

Reason for Hold-Out Not Trying Plant-Based	% Ranking Importance Among Hold-Outs
Taste	95%
Price.....	91%
Flavor.....	89%

Many of these buyers also view healthy eating, a desire to eat less meat and dairy, and eating products that are better for the environment, as less important to them than in the past.

MAGIC IN MUSHROOMS

The recent trade shows indicated there could be magic in mushrooms. Mushroom-based products — at least in the case of meat analogs — can offer great taste and a much cleaner label. These products are made with mycelium which is derived from mushroom roots. While mycelium may be a turn-off name for some shoppers, the products do deliver on one simple thing: taste. They also have a relatively clean label vs. many plant-based meat products.

In addition to traditional meat products, we were favorably impressed with new mushroom/mycelium-based bacon which offered a welcome relief from initial plant-based efforts that were no better than eating salty cardboard.

There was little evidence of the reappearance of blends (meat- and plant-based) in the category at the recent trade shows. Various blends of plant-based and animal meat products have been introduced in the past but, like other categories, they often end up in no man's land. Other ingredient stalwarts included jackfruit, cauliflower, as well as new plant-based cheese products. Plant-based chicken was scarce at this year's Plant Based World Expo. ■

Don Stuart is a managing partner at Cadent Consulting Group (cadentcg.com), with offices in Wilton, Conn., and Evanston, Ill. He can be reached at don.stuart@cadentcg.com).



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WHY DO WE STILL LET SMALL BRANDS FAIL?

Every new item deserves a marketing plan, especially niche items without the big bucks. These items are key to differentiation and much more.

BY **BOB ANDERSON**

Almost four years ago a good friend of mine gave us his thoughts on this. He questioned if retailers were merchandising plant-based foods for profit, to satisfy consumer wants or to build loyalty. He went on to question if the consumer was buying products based on habit or what he called SWAG (scientific wild-ass guess) method.

BOTH SWAG AND HABIT

His conclusion was a little of both. He rightly pointed out that these new products were given shelf-talkers (sometimes), and little-to-no online education. He added that retailers just slapped a price on them without any fanfare about the product benefits and then exiled them to the bottom or top shelf, often with just one facing, and rarely any endcap or secondary display support.

What my friend was trying to call out was that new items that generate new sales and, in many cases, may represent the new trends that younger consumers are looking for (and even demanding) are given little fanfare, support or space. Rather it's the big national brands with the marketing, merchandising dollars that get their items the primo shelf space and endcaps as that is the safe thing to do.

So where are we today? Did we listen to my wise friend and take his counsel to heart? Sad to say, no. Even today the little guy continues to be the underdog when it comes to launching new items. Yes, a few retailers have "support new item day" and have supported some minority business ventures as well. But all in all, it's business as usual.

In fact, walking the aisle nowadays, there are few if any new item tags. On retailer websites, showcasing opportunity for new items is all but dead. The small manufacturer must rely on word of mouth, a lucky article touting the benefits of their item or just pure



It's not easy being a small brand, and retailers need to give them more serious consideration. They deserve it.

luck. Asking for a display or demo is laughable as there is still no way to compete with the big guys. Yes, a few retailers have gone from burying the item on the top or bottom shelf, to "creating" the one door section down from the 15-door pizza section, next to the one door ethnic/specialty door.

As a former buyer, I was in charge of a category, and with that came the expectation of sales and profit. Yes, I understood markdowns were bad and space was at a premium. Yes, I saw the big money offer for displays and ads. But what I also saw and more important listened to (including my friend's wise words) was that as a buyer and retailer I was also the eyes and ears of

my customer. Those customers expected me to be on top of trends (not fads) and not be afraid to fail and learn from what didn't work and what did. Just taking on an item and thinking that it was going to rocket to the top by itself wasn't going to happen.

What did need to happen was working with and

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- ▶ listening to both my customers and manufacturers. Just as with any business start-up, we needed a plan for investing time and effort into the item. Because, when a new item is left alone, the odds of success (and sales and profits) are slim. If we were going to put in the item, we needed to put in the time and effort to help it succeed. Sure, not all items are going to be home runs whether they're from a big or small manufacturer, but not giving them the same opportunity is a recipe for failure.

I found out that by taking chances on new items — items that were in the news, on customers' minds and shopping lists — required having a structured plan to showcase them. It definitely paid off. In fact, "new" did create additional sales and profits, and helped make us their destination shopping spots. It opened up the door to more "little guys" to showcase their new items. And even in a few cases it allowed me to have two of them to partner up in promoting their products.

A PERSONAL CONNECTION

I'm sure we all have seen the yearly TV ad from American Express supporting small business week. Perhaps retailers could piggy back on this in-store and online by featuring items from small businesses, including local brands that they carry in their stores. American

Express's event is in May, but you don't have to wait for that. You can create your own small business event whenever you want. Feature new items, include a few lines about the company and you have created a per-

'Sure, not all items are going to be home runs whether they're from a big or small manufacturer, but not giving them the same opportunity is a recipe for failure.'

sonal connection with your customer and manufacturer. This not only lets your customers know that you're listening and caring about their needs, but at the same time gives a shot in the arm to the little guy who after all did listen and is taking the chance on success.

I couldn't end this without giving credit where credit is due, to my friend and Editor Emeritus, Managing Partner of *Frozen & Refrigerated Buyer*, Mr. Warren Thayer. ■

Bob Anderson is the retired vp/gmm at Walmart, where he worked for 17 years. He can be reached at bob.sue@sbcglobal.net.



Bob Anderson



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PARENTAL GUIDANCE SUGGESTED

A new study shows dads and moms have different approaches to grocery shopping. Do you know who's in your store?

A new report from consumer data and analytics firm YouGov America, Redwood City, Calif., reveals that more American dads are taking responsibility for grocery shopping. From 2017 to 2023, the number of dads who said they're the sole shopper for their household jumped from 39% to 50%, while the number of moms who made the same claim fell from 68% to 63% (clearly, moms and dads disagree on exactly who's doing the majority of shopping). The survey also reveals some interesting differences in how the two shop for groceries.

Moms are more likely than dads to shop sales, use coupons and look for deals (79% to 70%) while dads are more likely than moms to only buy top brands (49% to 31%). Compared to moms, they also prefer smaller, more frequent shopping trips over bigger, less frequent trips (58% to 51%). It comes as no surprise, then, that moms tend to spend more per trip than dads. They're also more likely to shop in brick-and-mortar supermarkets than dads (80% versus 73%), who do more online shopping for groceries (30% to 19%).

What do dads buy significantly more of than moms? Fresh seafood and alcohol. Moms, on the other hand,

buy significantly more of everything else, including dairy products, snacks and pantry items. Consistent with those results, more dads than moms report noticing significant increases in alcohol prices while more moms than dads say they've noticed significant increases in food prices.

Moms and dads also consider different brands when shopping, with moms more likely to consider brands such as Pillsbury and Ore-Ida that can be used to create family meals, and dads more likely to consider brands like Fiber One, Clif and Beyond Meat that are related to personal health/lifestyle.

Both parents call Walmart their favorite supermarket. But beyond that, dads generally like warehouse club stores more than moms while moms in most areas of the country favor Aldi more than dads (which may be related to dads' affinity for popular brands). However, results vary by region. ■



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VOLUMES ARE DOWN, BUT CONSUMPTION ISN'T

New research by Circana shows shoppers are adopting a variety of strategies to beat inflation.

A new report from Chicago-based market research firm Circana, formerly IRI and The NPD Group, reveals that although food and beverage volume at retail continues to decline (even in the face of moderating inflation), consumption does not. But not all of that volume is shifting to foodservice, which is facing its own inflationary pressures. In fact, food away from home prices

Total basket spend per trip in July 2023 was up only 0.5% compared with July 2022 — way less than the rate of price inflation.

jumped 7.5% from July 2022 to July 2023 while CPG food inflation rose only 4.9% — though it's up an average of 20% from 2019. Combine that with nearly \$17 trillion in household debt (approximately 10% of disposable

income), the recent elimination of \$23 billion in annual SNAP benefits, and the resumption of student loan payments, and it's no surprise that 94% of consumers are concerned about the cost of food, according to Circana. So how are they able to eat as much as before?

Foodservice volume is increasing somewhat year-over-year, reports Circana, but growth is uneven (QSRs and breakfast-focused formats are outperforming FSRs and lunch- and dinner-focused formats). And with 14% of meals sourced from foodservice at the end of 2022, the channel still hasn't gotten back to its pre-pandemic share of 16%. Plus, foodservice costs are more than four times the cost of eating at home, and the absolute dollar gap is widening, according to Circana.

To make ends meet without actually reducing consumption, consumers have adopted a wide variety of new shopping behaviors, with 84% reporting one or more changes (up 2% from June). Looking for sales is the most popular strategy (employed by 53% of shoppers), followed by cutting back on non-essentials (46%), using up fresh foods before they go bad (41%) and using leftovers more (39%). Another 31% of shoppers say they are switching to lower cost brands more often, especially store brands, while an equal number



Cash-strapped consumers are shopping sales, cutting back on non-essentials and trading down to less expensive brands. But they're still not willing to sacrifice convenience — good news for frozen meals.

are looking for coupons more often. In addition, the U.S. Census Bureau reports that the number of households sourcing meals from food banks rose 15% in April 2023 versus the previous April.

One thing consumers are not ready to give up is convenience. Dinners characterized as no-prep, fast-fix and one-dish are all on the rise, while those described as “invested” and time-intensive are becoming less common. In-home meals are also being prepared with fewer ingredients versus a year ago (-5%). That’s good news for the frozen department, including categories such as frozen poultry and meat, frozen pizza and frozen sandwiches, all of which have seen their share of occasions rise during the past year, according to Circana.

Interestingly, the company’s research found that consumers are making an average of 10 more trips for food and beverages annually than they were two years ago, but they’re narrowing the number of channels they shop — and basket sizes (in units) are down. Total basket spend per trip in July 2023 was up only 0.5% compared with July 2022 — way less than the rate of price inflation. ■



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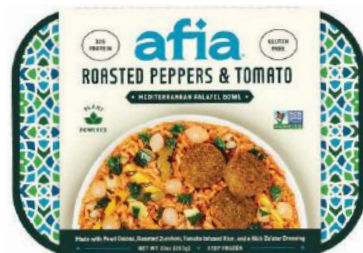
NEXTY AWARD WINNERS NAMED

Here are frozen/refrigerated honorees.

This season's NEXTY Awards winners were announced last month at Expo East in Philadelphia. The awards recognize the most progressive, impactful and trustworthy products in the natural products industry, according to New Hope Media, the show sponsor. Here are winners in the frozen and refrigerated categories.

Atlantic Sea Farms Spicy Gochujang Seaweed Salad won for best new plant-focused product. It is made from fermented Maine kelp and crunchy daikon radish enlivened by fresh ginger, sesame, and gochujang, the popular Korean fermented chili paste which adds a rich, gently-sweet heat. Uses of the refrigerated product include salads, stir fries, noodle dishes, tacos, pitas, and grain bowls and as a topper for hot dogs and hamburgers. It's also good as a snack straight out of the jar. The woman-owned company is based in Biddeford, Maine.

Afia Foods Mediterranean Falafel Bowl with Roasted Peppers and Tomatoes won for best new frozen product. Inspired by Burghul bi Banadoura, a classic dish that has both Lebanese and Turkish roots, it features pearl onions, roasted peppers and zucchini as well as Afia falafel over rice infused with a rich za'atar tomato sauce. It is one of four new varieties of 10-ounce bowls from the Austin, Texas-based company. The meals are certified non-GMO, vegan, gluten-free, soy-free, nut-free and preservative-free.



Painterland Sisters Plain Organic Skyr Yogurt won for best new meat, dairy or animal-based product. The product has 21 grams per serving (3/4 cup) and three carbs. Made with 6% healthy milk fat, it is lactose-free, sweetened with organic fruit and cane sugar and free of additives, fillers and preservatives. It has billions of probiotics, including BB12. Milk is sourced from small, regenerative family farms in Pennsylvania and neighboring regions, and made using an ultrafiltration process to yield more nutrient-dense yogurt. Sisters Stephanie and Hayley Painter launched the women-owned business to help preserve, showcase and utilize their family's Westfield, Pa., organic dairy farm, Painterland Farms.

Happy Wolf Apple Cinnamon Fridge-Fresh Bar won for best new special diet food. The bar was co-developed



by a founder mom who had a tough time finding healthy bars for her kids. It uses refrigeration to keep the bars fresh, so it has no preservatives. The organic, non-GMO, allergen-free and Clean Label Certified bars use dates and honey as sweeteners, as well as seed-butter for heft and flavor. Each bar has two

grams for fiber, three grams of protein and six grams of healthy fats. Happy Wolf is based in Brooklyn, N.Y.

Smallhold Mushroom Pesto won for best new condiment, sauce and/or dip. The organic product is made with imperfect mushrooms which would normally be tossed as waste. Each plastic-neutral-certified container holds a half pound of mushrooms, along with savory aromatics and oil. The Brooklyn, N.Y.-based Certified B corporation has a distributed network of urban farms, allowing it to grow mushrooms closer to the end-consumer. Locations include Brooklyn, Austin, Texas and Los Angeles.

Three companies won Editors' Choice Awards from New Hope's journalists, based on creativity and sustainability. The winners within frozen and refrigerated categories were:

Jinka Plant-based Calamari, made from chia seeds and pea protein said to taste remarkably like the squid version. It is the first product in a new clean-label, minimal-ingredient portfolio from Jinka, a BIPOC (Black, indigenous and people of color), woman-owned company based in Burlingame, Calif.

Arya International LLC Spinach Roti was an Editor's Choice for Tasty Discovery. The ready-to-eat traditional Indian flatbread (think naan) are vegan and made with spices, veggies and whole grains. The spinach roti is a vibrant green, infused with whole cumin seeds. It has a blistered surface and a soft, chewy texture with paper-thin layers good for scooping up rich sauces or stews. It is shipped frozen and sold chilled. Arya International is in Parsippany, N.J.

Prime Roots Koji Foie Gras Torchon won an Editor's Choice Award for innovation. The plant-based charcuterie is 89%-92% more sustainable than conventional animal proteins, according to the Berkeley, Calif.-based Certified B Corporation. Its meat analogues are made without nitrates and other preservatives common to the deli case. ■

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GOING STRONG

After netting an all-time high \$1 billion in sales last quarter, Grocery Outlet is poised for continued growth.



BY DENISE LEATHERS

Ever wonder what happens to boxes of frozen pizza that offer a chance to win tickets to Super Bowl LVII? — which was played in February. Or the pocket sandwiches in a funky new flavor that just didn't resonate with consumers? What about the perfectly good gingerbread-flavored ice cream still available after the holidays? Savvy shoppers can find them all at

Grocery Outlet for 40% to 70% less than their suggested retail price. And these aren't brands you've never heard of before. In fact, the frozen aisle is a veritable who's who of the department's heavy hitters (think Jimmy Dean, Tyson, Eggo, DiGiorno and Birds Eye, to name a few), differentiating Grocery Outlet from private label-heavy deep discounters like Aldi.

Often described as the TJ Maxx of supermarkets, the Emeryville, Calif.-based extreme value retailer utilizes a unique opportunistic buying model that

'We are still in the early stages of our growth story.'

makes everyone happy: Manufacturers are able to move surplus inventory that would otherwise go to waste and consumers get some screamin' hot deals. During a recent visit to a store in Warminster, Pa., we spotted Green Giant Simply Steam veggies for 99 cents, Newman's Own pizza for \$3.99 and Kashi gluten-free waffles for \$1.99. While the assortment varies significantly from week to week, depending on what's available in the marketplace, Grocery Outlet also carries a wide variety of products "made to order" (MTO). MTOs are best-sellers that are available all the time — at reduced but not crazy prices — so no matter the category, consumers always have a good option. Still, choices are limited. And shoppers do like variety. So how much bigger can this thing really get? If recent results are anything to go by, the sky's the limit.

POTENTIAL FOR 4,000 STORES

During the quarter ended July 1, Grocery Outlet's net sales topped \$1 billion for the first time on the strength of a 12.5% gain. "And we are still in the early stages of our growth story," said president and CEO Robert Sheedy in an Aug. 8 earnings call during which he also noted "the potential to operate over 4,000 stores in the U.S."

Although the company opened four new stores (and



At Grocery Outlet, frozen endcaps are usually reserved for the very best offers, including WOW! deals like this one: DiGiorno Bacon & Cheese Stuffed Crust Pizza for \$4.99 (\$7.99 elsewhere) and Crispy Pan Pizza and Fully Stuffed Crust Pizza for \$5.99 (\$9.99 elsewhere).

closed one) during Q2, bringing its then-total to 447, the gains came primarily from a 9.2% increase in comp store sales. Those were driven by a 9.1% increase in the number of transactions (average transaction size was flat). In addition, gross margins increased 120 basis points to 32.3%, while gross profit jumped 16.9% to \$326.6 million. "More

customers are shopping us for the first time, existing customers are spending more with us, and overall customer satisfaction continues to increase," said Sheedy in his remarks.

And those new customers aren't just lower-income folks, he added, citing survey data that indicates more middle- and higher-income households are shopping Grocery Outlet than ever before. But will they still shop there once inflation eases? Sheedy thinks so. The ▶

Through Q2, growth has been especially strong in the fresh refrigerated department, prompting the installation of some additional cases.



Consumers won't find much private label (yet), but top brands such as Eggo are widely available, differentiating Grocery Outlet from Aldi and other deep discounters. Seen elsewhere for \$2.59 to \$3.99, these SKUs were selling for \$1.99.



- ▶ company also saw an influx of new customers during the 2008-2009 economic downturn, he recalls. "And then as the economy improved, many of them stuck with us." Plus, "We're a better, stronger company than we were back then... [So] we feel really good about future retention and continued growth."

Grocery Outlet recently opened its 450th store (in Las Vegas), one of eight planned for Q3, but Sheedy said that the company is "going after the tremendous white space that's available to us." To complement its organic growth efforts, the chain is developing strategic relationships with large property owners, looking at real estate from

retailers that have gone out of business and considering small regional acquisitions, he explains. The company remains committed to 10% annual growth, "but we have lots of different avenues for that."

In the near term, however, Grocery Outlet expects to enter a ninth state, Ohio, later this fall, and after expanding into New Jersey and Maryland during the past two years, it will also continue to grow its presence

in the mid-Atlantic. The company is still opening stores in its native California, too. But the key to its success in every market is its independent operators.

'The strong partnership we have with operators allows us to out-chain the locals and out-local the chains.'

Though they're supported by the company, "Operators enjoy the autonomy of running their own stores, selecting localized products, making merchandising decisions and providing outstanding service to their customers every day," said Sheedy during the Q2 earnings call. He added, "The strong partnership we have with operators allows us to out-chain the locals and out-local the chains." Sheedy also noted that although interest in becoming an operator is at an all-time high, fewer than 1% of interested candidates are selected to join the



Spot boxes at the entrance to the store allow independent operators to feature refrigerated items popular in their communities. This one included 10-ounce grass-fed, free-range New York strip steaks for \$4.99.

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*Datassential, 2022
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WOW! deals can also be spotted inline: check out the price on Tyson boneless, skinless chicken thighs.

- Grocery Outlet family. For those that are, average net income for “mature operators” exceeded \$250,000 last year.

GROWING FROZEN & REFRIGERATED

While the number of Grocery Outlet stores continues to grow, within stores, frozen and refrigerated sections are growing, too. “Frozen and refrigerated product demand has increased, and space requirements in both new and older stores have grown to meet that demand,” confirms senior director of frozen foods Mike Kirby.

Through Q2, however, growth has been especially healthy in the fresh refrigerated department, reports Vivian Son, senior director of refrigerated foods. “So in recent years, we’ve added cheese islands to better showcase specialty cheeses and home meal replacement cases to display our grab-



NOSH items (natural, organic, specialty and healthy) that shoppers on a budget can’t always afford at conventional outlets are seeing some of the biggest gains.

and-go category. We have also [installed] egg cases to ensure our stores remain in stock, salad cases to increase the amount of fresh produce and bagged salad we can offer, and spot boxes that give our independent operators the flexibility to stock more refrigerated items that are popular with their community.”

Although most stores are equipped with 40 frozen doors with endcaps, 10 dairy doors, 36-foot deli sections, 16-foot meat cases and three spot boxes, “We have found success utilizing self-contained units as they are easily available and straightforward to install,” adds Kirby.

In both refrigerated and frozen, NOSH products (natural, organic, specialty and healthy) that shoppers on a budget can’t always afford at conventional supermarkets are seeing some of the biggest gains — and creating excitement in the aisles, says Kirby. “We can provide extreme value on brands that are top of mind for our health-conscious customers,” which makes those dedicated sets a true destination. But manufacturers of NOSH products benefit, too, because they’re able to reach a much wider audience. “We get their brands into the hands of customers at a discounted price,” he explains. “It gives them a chance to fall in love with the item and look

‘We get [better-for-you] brands into the hands of customers at a discounted price. It gives them a chance to fall in love with the item and look for it again at a local health food store once the deal is sold through in our stores.’

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SANDWICH

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HOT & CRISPY FROM YOUR TOASTER

CALORIES	PROTEIN	CALCIUM	IRON
330	9g	128mg	2mg

2 PACK
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25%
of consumers would
go to a store just to
get a Crunchy
Veggie Burger.



- ▶ for it again at a local health food store once the deal is sold through in our stores.”

A PLACE FOR NOSH...AND PRIVATE LABEL?

In the store we visited, a standalone refrigerated case, a frozen endcap plus four doors in the frozen aisle were all reserved for NOSH products — though additional plant-based, organic and other specialty items were merchandised throughout the store. Three other frozen endcaps were reserved for WOW items — “the most exciting deals that we have in each store,” according to Kirby. On the day we visited, for example, there were three types of DiGiorno pizza for \$4.99 and \$5.99 in one bunker and Franks’ Red Hot Bites for \$3.99 and One Bite Pizza Bagels for \$1.49 in another.

We also spotted a fair number of locally made products, such as Pellman frozen desserts and Philly Gourmet sliced steaks, highlighting the ability of operators to customize their assortments with local brands. “For our independent operators, understanding their local shopper, being



A free-standing refrigerated unit features a variety of NOSH beverages from popular brands such as So Delicious, Planet Oat, Almond Breeze, Lactaid, Naked and Bolthouse Farms.

‘When you think about the business from a shopper needs perspective, you can’t help but consider a private label program.’



While opportunistic buys offer some of the biggest savings, “made-to-order” items available all the time allow consumers to do a complete shop — and still save money.

responsive to customer preferences and serving the community is an important part of what they do,” explains Son.

One thing Grocery Outlet customers don’t see much of is store brands. However, says Kirby, “As our model evolves and our shoppers continue to look to us to complete their full shop, we see the benefit in expanding our high-quality consistent offering at a great value.” Does that mean the chain might consider an own brand?

“When you look at the data, it shows that, traditionally, loyal private shoppers enjoy bargain hunting for great quality and low prices. It just feels like a natural fit with our existing opportunistic treasure hunt experience,” says Kirby. “So, when you think about the business from a shopper needs perspective, you can’t help but consider a private label program.” What might the brand look like? When would it debut? What might it be called? “You will just have to wait and see for yourself when it hits the shelf at a local Grocery Outlet,” answers Kirby.

TECHNOLOGICAL ADVANCES

With such an eclectic, ever-changing assortment, how do operators successfully manage merchandising? “We leave a certain amount of flexibility by working off of a

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► flow versus a schematic or planogram,” answers Kirby, who suggests it’s equal parts art and science. That said, Grocery Outlet just rolled out a new portal that’s expected to help with the science side.

“[The] new platform will provide operators with better analytics and easier access to information to make smarter business decisions,” said Sheedy in his Q2 earnings call. In addition to facilitating faster, better decision-making around everything from inventory to ordering to managing the mix, the portal will boost operator efficiency, and time that used to be spent analyzing spreadsheets can be put to better use.

While Grocery Outlet

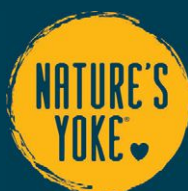


Often praised by Grocery Outlet shoppers, the cheese section is a standout and includes a wide variety of specialty and plant-based options.

doesn’t have a loyalty card per se, it does have a mobile app that delivers exclusive offers and coupons, displays the most up-to-date deals, creates shopping lists, saves digital receipts and automatically enters users into a “Win What You Save” sweepstakes. However, the chain is testing a more personalized app that will track specific customer transactions and allow more targeted communications. The company also maintains an e-mail database for delivery of WOW alerts and other news. “And thousands of shoppers follow our local store Facebook pages to keep up with new items hitting local shelves and the activities of independent operators in their community,” says Son.

Although the in-store treasure hunt is a big part of Grocery Outlet’s appeal, 95% of stores offer on-line ordering via delivery partners Instacart, DoorDash and Uber Eats, including all stores in New Jersey, Maryland and Pennsylvania. “We continue to be delivery only, which

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is just a percentage of the total channel, and we'll look to enhance that in the future," said Sheedy. He declined to disclose exact e-commerce penetration, "but it's a small percent of sales."

A WORD TO POTENTIAL PARTNERS

Kirby and Son say they and the rest of the Grocery Outlet buying team are at almost every CPG trade show, looking for new partners to help grow its brand selection. What do they want them to know? "We work with major manufacturers as well as upstart brands to purchase opportunistic products — short-coded, package changes and other special inventory situations,"

'Our world-class purchasing team is committed to being an easy business partner, working quickly to negotiate deals with no slotting or placement fees.'

says Kirby. "Our world-class purchasing team is committed to being an easy business partner, working quickly to negotiate deals with no slotting or placement fees. Anything that we purchase opportunistically is sold through our stores directly to customers."

Adds Son, "There is never a quantity too large or too small for us to buy, and we are always quick to respond to any offers." ■



The frozen section at Grocery Outlet is a veritable who's who of top brands, including pizza category luminaries Red Baron, Freschetta, Tombstone and more.



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COULD INNOVATION SPARK FROZEN SEAFOOD GROWTH?

Despite months of deflation, fresh and frozen seafood sales continue to suffer. Manufacturers are doing their part to turn things around.

BY CHRISTINE BLANK

Frozen seafood prices rose only 0.5% in August — much less than in previous months and less than total food and beverage inflation (+3.6%), according to Chicago-based market research firm Circana. Fresh seafood prices, on the other hand, actually fell 0.9%. Although conventional wisdom suggests volume should have picked up — or at least stabilized — in the face of moderating prices, frozen seafood dollars actually fell 7.7% to \$619 million, while volume tumbled 8.1%. Meanwhile, fresh seafood sales plunged 7.4% in August to \$595 million, while volume decreased 6.6%. What gives?

SUMMER GRILLING, DINING OUT TAKE A TOLL

“August is always a big grilling and outdoor meal month that tends to be meat-centric,” says Anne-Marie Roerink, principal at Circana partner 210 Analytics. In addition, 210 Analytics’ August survey revealed the lowest consumer-estimated share of meals cooked at home since March 2020. “Fewer home-cooked meals means more restaurant or deli-prepared meals,” explains Roerink.

The news was a bit better during the 12 weeks ended Aug. 13, when frozen seafood dollar sales fell 4.3%, but volume declined only 0.7%, thanks to 5% price deflation, according to Circana. Shellfish dollar sales dropped 5.4%, but volume rose 2.8%, primarily due to a huge jump in crab dollars (+31.9%) and volume (+50.4%).

“Now that prices have come down in crab and lobster in particular, we’re seeing the volume come back in a big way... Many retailers are getting behind it as higher cost inventories have been worked off,” says Chris DuBois, executive vp and protein practice leader at Circana. Other significant sales increases came from frozen snapper, croaker, pike, corvina, sole, sardines, and rockfish.

In refrigerated seafood, overall surimi dollars dropped 8.3% and volume fell 11.6% for the four weeks ending Aug. 13, according to Circana. But during the 52 weeks ending August 13: sales were off only 3.3% while volume dropped 7%.

Still, surimi sales reflect overall grocery sales, not a problem with seafood, according to Lou Shaheen, vp of sales and marketing for Bellingham, Wash.-based Trans-Ocean, which is launching new surimi products later this year.

“Most categories in the grocery store are not beating last

year’s numbers, and our category is no exception. We feel much of this is due to price hikes that were taken in 2021 and 2022 in most categories, including ours,” Shaheen says.

IT’S THE ECONOMY, STUPID

Frozen seafood performance is also impacted by price comparisons to 2020 and 2021. However, suppliers acknowledge that shoppers’ economic concerns are hampering refrigerated and frozen seafood sales. “Profound food inflation, which was higher in grocery versus food-away-from-home, forced consumers into new shopping habits, including trading down, turning to discount chains, etc.,” says Jenny Doan, director of marketing for Lakeland, Fla.-based Tampa Maid, maker of the Margaritaville brand. “While seafood inflation wasn’t as high as some other categories, seafood tends to have higher price points than other proteins and staples; therefore, it may have simply been squeezed out of consumers’ budgets.”

Tom Domino, COO of Jersey City, N.J.-based The Choice Group, agrees that inflationary pressure cut into

‘While seafood inflation wasn’t as high as some other categories, seafood tends to have higher price points than other proteins and staples; therefore, it may have simply been squeezed out of consumers’ budgets.’

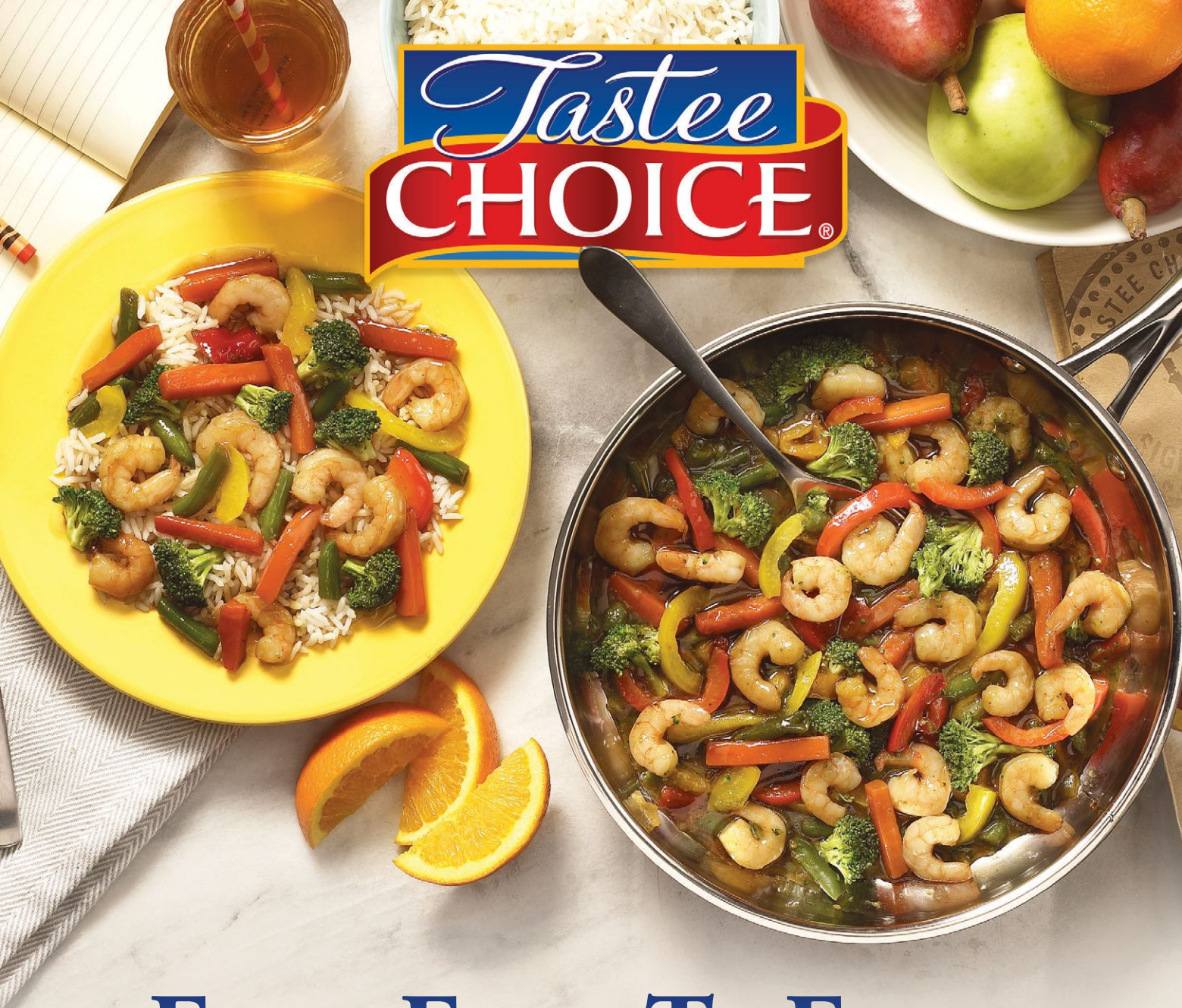
consumers’ disposable income. To that end, the company recently expanded its Tastee Choice brand into breaded and battered shrimp SKUs. “Our primary focus is on aquaculture-derived products — primarily shrimp. We believe that if there is any seafood that can increase consumption at a value price, it is going to be shrimp,” he says.

Shaheen thinks consumers will continue to seek out value. “Many are switching to store brand products and are taking advantage of any cents-off programs available,” he says. Trans-Ocean is responding to that need with retail promotions, IBOTTA rebate offers, and loyalty card coupons that provide an incentive to purchase its products.

While deals and discounts can help lure more shoppers to frozen seafood, Doan also suggests better messaging that motivates consumers to eat more seafood. Grocers can



Handy expands its co-branded Old Bay lineup with microwaveable Old Bay Crab Cake Minis.



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FROZEN SEAFOOD

Sales in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined between 2019 and August 2023, according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. Percent change is versus the same period a year ago.

CATEGORY	2019	2020	2021	2022	Q1 2023	Q2 2023	Aug. 2023	% CHG \$	% CHG LBS
FROZEN SEAFOOD	5%	37%	3%	-2.6%	-3.2%	-2.9%	\$619M	-7.7%	-8.1%
Frozen shellfish	7%	42%	4%	-6.4%	-4.1%	-6.2%	\$364M	-10.1%	-12.9%
Frozen finfish	3%	30%	-1%	5.2%	-1.1%	-2.7%	\$229M	-3.6%	-1.0%
All other frozen seafood	3%	32%	10%	-6.9%	-7.3%	-5.8%	\$25M	-7.5%	-8.6%
Frozen seafood alternatives	-15%	19%	20%	-6.4%	-14.1%	-15.5%	\$0.9M	-18.0%	-23.5%
FRESH SEAFOOD	4%	26%	4.2%	-8.1%	0.2%	-2.3%	\$595M	-7.4%	-6.6%

Source: Circana, Integrated Fresh, Total U.S., MULO

- call out benefits such as high protein content, sustainability, and the natural dovetailing with diets such as flexitarian and keto, she says.

VALUE-ADDED, CONVENIENCE TOP FROZEN SEAFOOD TRENDS

While overall frozen seafood sales are lagging, “Value-added frozen seafood “continues to answer consumers’ need for time-saving, more healthful, unique and differentiated meals and snacks,” says Doan.

To meet demand for easy-to-heat and ready-to-eat apps and meals, Salisbury, Md.-based Handy Seafood recently introduced Old Bay Crab Cake Minis. “Consumers are seeking delicious products that are convenient. Old Bay Crab Cake Minis are microwavable, making them perfect for a quick meal or snack,” says director of marketing Maureen Johnson.

Sold in 10-ounce boxes of 20 minis, the new product complements Handy’s other Old Bay SKUs: Old Bay Crab Cake, made with wild-caught blue swimming crab and Old Bay seasoning, and Old Bay Breaded Shrimp, featuring fresh shrimp lightly coated in a crispy Old Bay panko coating.

On the entree side of the category, Fall River, Mass.-based Raw Seafoods recently launched a specialty seafood lifestyle brand, City Pier, which includes a variety of unique, high-quality frozen seafood meals. The first offerings include Grilled Shrimp, Hot Italian and Sweet Italian Wild Salmon Meatballs,



Raw Seafoods debuts five unique frozen seafood meals under its new City Pier brand, including Hot Italian Wild Salmon Meatballs.



Aquamar Seafood Tenders are described as the only fully cooked refrigerated seafood product of their kind.

Scallops Au Gratin, North Atlantic Wild-Caught Sea Scallops, all priced between \$12.99 and \$19.99. A variety of seafood appetizers, sauces, and fish portions will be added in the near future.

Value-added innovation is also represented in the refrigerated seafood set where Rancho Cucamonga, Calif.-based Aquamar recently debuted Seafood Tenders, billed as the only fully-cooked refrigerated product of their kind. Available in four varieties (Smoked Salmon, Cod, Crab, and Smoked Haddock), the premium, ready-to-eat product gives seafood lovers what they want: “delicious, healthy protein that is affordable and can be easily prepared and enjoyed at home,” says the company.

“At Aquamar, we believe everyone should have access to healthy, high-quality protein, and our focus is on premium, ready-to-eat seafood solutions that are both affordable and convenient to prepare,” says CEO Daryl Gromley. He adds that easy-to-prepare seafood options are worth an estimated additional \$8 billion per year.

BIG NEWS IN SHRIMP SEGMENT

After the successful launch of Breaded Butterfly and Coconut Butterfly Shrimp earlier this year, The Choice Group is rolling out several new Tastee Choice frozen shrimp offerings early in the fourth quarter.

Available varieties include Extra Large Shrimp Scampi, which is covered in butter garlic sauce instead of a pellet or puck; Jumbo Popcorn Shrimp; Jumbo Tempura Shrimp; Extra Large Boom Boom



Tastee Choice will follow up its recent butterfly shrimp rollouts with five new shrimp SKUs in Q4.

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- ▶ Shrimp; and Jumbo Beer Battered Shrimp. The newcomers will be offered in 8- to 12-ounce packages with a \$3.99 to \$5.99 SRP. They will also be available for private label.

Another value-added shrimp supplier, New Orleans-based Prime Shrimp, recently added New Orleans Style BBQ Shrimp to its sauced shrimp lineup. The new flavor, expected to retail for \$9.99 for a half-pound, combines the tang of lemon butter and Worcestershire sauce with the spice of black pepper and chili flakes.

Also new to the frozen value-added shrimp category is a Farmed Shrimp Burger from Downey, Calif.-based Del



Prime Shrimp adds New Orleans Style BBQ Shrimp to its sauced shrimp lineup.

Pacifico Seafoods. After seeing the success of its Wild Shrimp Burger, which launched in Whole Foods Market last fall, company executives wanted to provide a sustainable, affordable farmed shrimp option, says CEO Roberto Aguilar.

"It's a cost-effective choice amid current economic concerns," he explains. "This product embodies our commitment to quality, sustainability, and meeting market demands."

One-pound bags of Aquaculture Stewardship Council-certified

Farmed Shrimp Burgers will be priced lower than Del Pacifico's Wild Shrimp Burger, says Aguilar. ■

SALES OF PLANT-BASED SEAFOOD TAKE A PLUNGE

Dollar sales fell 16% and volume tumbled 23.2%. But manufacturers continue to roll out new and improved offerings.

Plant-based meat sales — both fresh and frozen — have fallen over the last year, and plant-based seafood is no exception. Sales of frozen seafood alternatives dropped 16% during the 13 weeks ended Aug. 13, while volume plunged 23.2%, according to Chicago-based market research firm Circana.

"Plant-based seafood has some real challenges," says Chris DuBois, executive vp and protein practice leader at Circana. "Plant-based meat has been declining heavily

'This category will need to go back to the drawing board.'

over the last 18 months,

and the media coverage on that category has turned negative," he explains. "Plant-based seafood [has gotten] caught in that trend, and

it's hard to fight that headwind."

A 9.3% increase in average plant-based seafood prices during the past 13 weeks doesn't help matters, adds DuBois. "This category will need to go back to the drawing board."

Plant-based seafood alternatives are following a similar path as plant-based meat alternatives, says Anne-Marie Roerink, principal at Circana partner 210 Analytics. "As stores add inventory [of a new product or category] or perhaps expand the selection, it tends to lead to big triple-digit increases off of a small base. Once the expansion of distribution settles and categories have to drive growth

through greater demand, that's when the true test occurs."

In the case of plant-based meat alternatives, she continues, re-purchase and trial rates were too low to sustain growth, sending the category into a two-year decline. "Plant-based seafood alternatives appear to be following the same path with sales having turned negative for many months running," says Roerink.

Still, plant-based seafood suppliers continue to launch innovative new products that they hope will resonate with current and future buyers. For example, Vancouver, British Columbia-based Konscious Foods recently rolled out the first frozen plant-based sushi rolls and poke bowls. Made from konjac plant, pea fiber, Jasberry rice, and organic red quinoa, the sushi comes in four varieties: California Roll, Spicy California Roll, Rainbow Roll, and Tuna Avocado Roll. The company's Poke Bowls feature organic rice topped with plant-based salmon or tuna, edamame, corn, mangoes and sauce.

Another new entry comes from Earth City, Mo.-based Beleaf Vegan, whose plant-based shrimp is "crafted to resemble the flavor and mouth feel of conventional shrimp," according to the company's website. Up for a NEXTY award at Natural Products Expo East, the product is made with konjac, vegetable root starch, paprika, and plant-based vegan seasoning. ■



Beleaf's new Plant Based Shrimp was crafted to deliver the flavor and mouthfeel of conventional shrimp.



OUR INFLUENCERS ARE ATTRACTING NEW SHOPPERS TO YOUR SEAFOOD DEPARTMENT.

To keep the surimi category growing, Trans-Ocean Products is engaging with social media influencers to tout the great taste and fully cooked convenience of Crab Classic. With innovative ideas like a TikTok Challenge and an Instagram Contest, along with recipe posts, millions of consumers are being influenced by compelling Crab Classic content that leads to purchases in your stores. *It's just what you've come to expect from the #1 brand.*



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POTATOES DRIVE FROZEN VEGGIE DOLLAR GROWTH

Inflation (and air fryers) deserve much of the credit for potatoes/onions' 32.8% gain — as units edge up 0.2%.

BY NEAL LORENZI

Although units fell 4.9%, frozen vegetable dollar sales shot up 16.2% to nearly \$1.49 billion during the 12 weeks ended Aug. 13, 2023, reports

Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. However, much of that growth is being driven by the frozen potatoes/onions category, where dollar sales jumped 32.8% to \$789.34 million and units edged up 0.2%. Meanwhile, in the frozen plain vegetables category, dollars rose 4.5% to \$618.78 million, but units fell 5.0%.

Despite the recent stumble, frozen veggies' share of total vegetable sales is up 1.2 points from four years ago to 13.5%, reports Joe Spivak, Birds Eye brand manager at Chicago-based Conagra.

"Consumers have always turned to frozen vegetables for convenience," a key benefit whose importance was highlighted during the pandemic, he explains. However, "They're now seeking more variety in flavors and formats."

Although they can be everything from a snack to a main

Conagra's new Birds Eye Fire Roasted Vegetables allow consumers to enjoy the taste of grilled veggies without having to actually grill them.

dish, vegetables side dishes are still a favorite, says Spivak. In fact, "Four in 10 meals include a side dish, and vegetables are the top choice, ahead of potatoes, rice or salads," he reports, citing recent research from The NPD Group.



THE FRIES HAVE IT

That said, French fries (+28.9%) and plain potatoes (+83.7%) are clearly having a moment. Air fryers have helped drive the growth because they make it easy to make crispy fries at home in less time, says Kristen Thompson, senior vp and president of the frozen and vegetables unit at Parsippany, N.J.-based B&G Foods, maker of the Green Giant brand. "We hear a lot of consumer feedback that the air fryer is the best way to prepare Green Giant Veggie Tots, so we think the popularity of this appliance is certainly contributing to market growth."

Restaurant menu trends are also influencing the frozen veggies category, says Shep Kroner, director of consumer insights at United Natural Foods Inc. (UNFI), Providence, R.I. "We are seeing more consumer interest in sweet potatoes versus traditional potatoes, both in French cut and in tots and puff varieties," he reports. In addition to sauced veggies, "Fire-roasted root vegetables and greens

(popularized on social media platforms) have found their way onto the shelf as well," he says. And riced veggies have become standard replacements for traditional rice as more consumers adopt the keto diet.

Kroner adds that Pan-Asian blends for stir fries and international flavors (like Mexican street corn) have also seen increased demand as consumers look to replicate restaurant meals at home. To help consumers recreate ethnic dishes in their own kitchens, UNFI will launch both an Organic Asian Blend and an Organic Mediterranean Blend as well as an Organic Root Vegetable Blend under its Woodstock brand early next year.

Conagra is rolling out new

Frozen veggies' share of total vegetable sales is up 1.2 points from four years ago to 13.5%.

FROZEN VEGETABLES

Sales in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined for the 12 weeks ended Aug. 13, according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. Percent change is versus the same period a year ago.

CATEGORY	\$ SALES	% CHG	UNIT SALES	% CHG	VOLUME	% CHG
FZ VEGETABLES	\$1,485,815,065	16.2	460,157,432	-4.9	708,449,943	-4.3
PLAIN VEGETABLES	\$618,777,388	4.5	273,146,228	-5.0	261,513,707	-3.1
Mixed Vegetables	\$187,120,888	-0.6	80,289,176	-7.3	82,598,898	-4.2
Broccoli	\$111,266,078	9.2	48,372,826	-2.9	49,446,537	0.5
Other Plain Vegetables	\$89,690,956	3.0	34,497,124	-4.1	32,362,116	-3.5
Beans	\$75,902,856	15.7	33,201,769	1.1	28,897,375	0.1
Corn	\$54,401,852	4.1	27,108,078	-7.2	26,034,684	-5.4
Peas	\$53,574,132	5.7	26,536,651	-4.7	24,558,229	-3.3
Spinach	\$26,769,641	3.6	13,956,572	-7.4	10,765,993	-6.7
Squash/Zucchini	\$8,120,087	-23.9	2,596,077	-25.5	1,975,879	-25.7
Carrots	\$6,696,624	16.3	3,892,428	-6.6	2,974,758	-9.0
Onions	\$5,234,276	17.8	2,695,528	5.8	1,899,236	5.6
POTATOES/ONIONS	\$789,335,443	32.8	167,139,660	0.2	322,082,883	-5.1
Fries	\$486,601,936	28.9	98,843,924	-1.9	196,691,553	-7.1
Hash Browns	\$96,287,274	40.0	23,228,005	1.8	41,904,983	0.1
Taters	\$92,993,340	21.1	17,353,734	-14.4	37,982,784	-23.0
Plain Potatoes	\$82,526,534	83.7	21,305,969	30.5	37,519,334	30.6
Onion Rings	\$30,926,359	16.6	6,408,028	-3.0	7,984,228	5.7
CORN ON THE COB	\$49,086,563	2.5	10,999,238	-3.2	116,160,386	0.4
PREPARED VEGETABLES	\$28,615,671	-34.4	8,872,306	-50.7	8,692,967	-42.8



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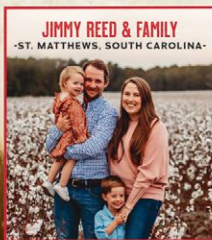


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JIMMY REED & FAMILY
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JUAN VELAZQUEZ LOPEZ & DANY MELGAR
CHANTLA, GUATEMALA



BALVINO YOS TZIRIN & FAMILY
PATZUN, GUATEMALA

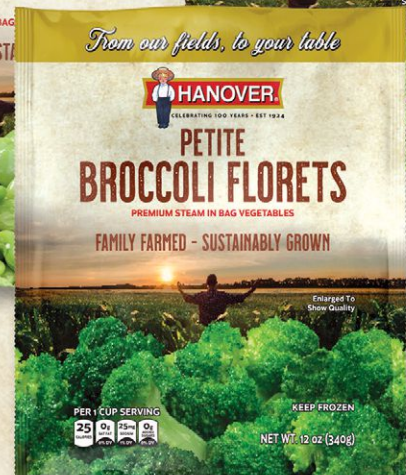


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- ▶ veggies and sides across four of its brands, starting with Birds Eye. Inspired by popular restaurant appetizers, Birds Eye Buffalo Cauliflower Dip and Spinach & Artichoke Dip provide a warm snack, appetizer or side and are ready to enjoy from the microwave in minutes. Meanwhile, four new Birds Eye Fire Roasted Vegetables (Fire Roasted Corn, Peppers and Onions, Brussels Sprouts, and Carrots) deliver the taste of grilled veggies taste straight from the oven.

Under the Marie Callender's brand, the company is adding four new vegetable-based casserole-style side dishes "inspired by comfort food recipes," says Spivak. They include Green Bean Casserole, Cheddar Broccoli Casserole, Sweet Corn Casserole and Cheesy Potato Casserole.

'Frozen Asian side dishes are growing 2.9 times faster than total frozen sides, but the category is dominated by rice dishes.'

"Frozen Asian side dishes are growing 2.9 times faster than total frozen sides, but the category is dominated by rice dishes," says Spivak. Intended to bring the bistro experience home, the new veggie-based sides include Chili Garlic Edamame, Sesame Green Beans and Teriyaki Broccoli, all in microwave-ready bags.

RECREATING RESTAURANT FARE

Finally, two new offerings from Alexia Foods help meet demand for chef-inspired sides, says Spivak. "New Cauliflower & Broccoli Au Gratin with Red Chili Flakes and Brussels Sprouts & Uncured Bacon with Roasted Onion and Parmesan Herb Sauce provide consumers with their favorite types of restaurant-quality sides at home."

For its part, B&G launched a line of Green Giant Restaurant Sides a year ago. But it's been so well-received that the company is launching four new varieties: Spinach Florentine, Brown Rice & Quinoa with Parmesan & Romano Sauce; Spring Veggies, Brown Rice & Quinoa with Garlic Basil Sauce; Roasted Root Vegetables with Garlic & Thyme; and Asparagus, Roasted Red Potatoes & Onions.

B&G is also building on its popular Green Giant Veggie Tots line with new Dino Veggie Tots, expected to be available nationwide by mid-fall.

Green Giant builds on the success of its original Veggie Tots with new Dino Veggie Tots.



Eathos Foods debuts an Organic Rainbow Carrot & Sweet Potato Blend featuring orange, purple and yellow carrots.

"We know parents appreciate the original Veggie Tots innovation as an easy meal solution to get their kids to eat (and enjoy) their veggies," says Thompson. "The rollout of dino-shaped Veggie Tots provides another opportunity for kids to have fun while eating their daily veggies."

Another new addition to the Green Giant lineup is Rainbow Riced Veggies. "This product is a fun, colorful addition to

dinner plates as it features purple, yellow, orange and white cauliflower," says Thompson. "We think this will be another hit with families."

Eathos Foods LLC, Watsonville, Calif., is also adding a little color to consumers' plates with its new Organic Rainbow Carrot & Sweet Potato Blend. The product combines orange, purple and yellow carrots with sweet potatoes, all tossed in rosemary garlic seasoning. It can be baked with a protein for a complete sheet meal, roasted and used as a salad topper, or served on its own as a side dish.

"The seasoning is light enough to be added to other flavors and defined enough to stand alone," says Gene Grant,

director of branded and strategic sales. He adds, "Consumers are looking for quick and easy ways to make complete meals for families. To meet that need, we are developing a new line of grilled veggies that include ingredients not commonly found in the market."

For consumers



UNFI's Essential Everyday Cauliflower Florets, Broccoli Florets and California Blend now come in 32-ounce family sizes.

looking for good value, UNFI recently launched 32-ounce, family-size versions of its Essential Everyday Cauliflower Florets, Broccoli Florets and California Blend, as well as a 12-ounce Riced California Blend.

LOOKING AHEAD

Despite inflationary pressures, the outlook for frozen veggies and sides is positive, says Thompson of B&G Foods. "The category typically benefits during times when people are looking to make their meals stretch and are eating at home more often. Other positive trends include the health and wellness that veggies offer as consumers are more mindful of what they eat and want to increase their veggie intake." ■



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In the ever-evolving world of frozen, it's crucial for retailers to keep pace with shifting eating trends. As consumer preferences continue to evolve, the demand for more diverse global flavors is on the rise. Hispanic, Indian, and Thai cuisines have emerged as the fastest-growing segments.¹ Millennials, in particular, are steering this shift, with Mexican, Asian, and fusion dishes projected to be the culinary stars of the next three years.²

As a result, the frozen aisle is about to experience a flavorful leap with the arrival of the **all-new Alexia® Spice of Life™ roasted frozen potatoes**. This innovative product line introduces three dynamic flavors that were born from a collaboration between Alexia and Spiceology. Offering proprietary custom spice blends, these new potatoes boast all the same high-quality, non-GMO, clean, and simple ingredients that consumers have come to love and expect from Alexia.

With **over 90% of millennials eager to explore new foods** and indulge in bold, authentic flavors,³ Alexia's new Spice of Life™ roasted frozen potatoes are perfectly poised to satisfy the many curiosities of adventurous food enthusiasts as they seek out new, elevated taste experiences. And thanks to



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1) Source: The NPD Group/ Future of Dinner 2022; Eating Patterns in America 2022; June 2022.

2) Ibid. 3) IRI's How American Eats—Frozen Food Trends: Strategies for Success in a New Consumer Environment White Paper.

INDULGENCE IS KING IN ICE CREAM

Despite inflation, ice cream and novelties outperform the frozen department, with decadent flavors and bite-size offerings leading the way.

BY TIFFINI THEISEN

Inflation pushed dollar sales of ice cream (+4.4%) and frozen novelties (+3.4%) higher during the 12 weeks ended Aug. 13, reports Chicago-based market research firm Circana (circana.com). Unit sales were down, but frozen novelties fared better, slipping only 1.8% versus 3.6% for ice cream (and 3.9% for the frozen department as a whole).

WHAT'S DRIVING GROWTH?

"Bite-size and mini versions of traditional treat formats continue to gain momentum post-COVID as consumers remain focused on ways to indulge while being health

conscious," says Katie Cline, vp of marketing at Phoenix-based Bubbies Ice Cream. "Our small format mochi treats with just 80 to 90 calories per piece fit into this segment by providing consumers with a perfectly portioned option that is as indulgent as it is guilt-free."

In the ice cream category, meanwhile, less expensive ice milk/frozen dairy desserts (+28.4%) continue to outpace conventional ice cream (+3.6%), highlighting consumers' desire for value.

Still, the folks at Acme Valley Ice Cream, Poulsbo, Wash., say "ultra-indulgent" ice cream is driving the most growth. In fact, more than half of ice cream consumers prefer a decadent product like Acme Valley, which contains 23% milk fat and does not add injected air, says director of sales Mike Zolezzi. For those shoppers, the company is adding three new flavors to its premium lineup, expected to appear at larger

retailers next summer: Chocolate Peanut Butter, Raspberry Chip and Salted Caramel.

Indulgence is also on the menu at Akron, N.Y.-based Perry's Ice Cream, which will follow up the rollout of its "extra-indulgent" pints earlier this year with a line of decadent ice cream bars in January. Dipped in a thick

Perry's Ice Cream will follow up its "extra-indulgent" pints rollout with an equally indulgent line of ice cream bars, coming in January.

Graeter's taps into the citrus trend with a new Lemon Meringue flavor, coming to grocers' freezers in February.

chocolate coating, the new desserts feature both smooth and crunchy textures. Available flavors include Bittersweet Symphony, Brownie Batter, Deep Sea Treasure, Let's Dough Buffalo! (in partnership with the Buffalo Sabres) and Panda Paws.

"These bars feature signature flavors consumers know and love from Perry's, providing the premium experience they are looking for," says senior brand manager Nichole Buryta, citing a 2022 SIAL America report that found 80% of ice cream users are seeking indulgent products.

"Consumers continue to want indulgence," confirms Shannon Sherrard, vp of sales for Graeter's Ice Cream Co., Cincinnati. She adds that the plant-based and good-for-you segments continue to decline, mostly because there have been too many of those options for too few customers.

CITRUS FLAVORS ON TREND

After consumers "begged" Graeter's for a lemon ice cream, the company will launch a Lemon Meringue flavor with crunchy lemon candy, marshmallow meringue and shortbread pie pieces in February 2024.

Of five bonus flavors offered during the summer of 2023 at Graeter's 55 scoop shops, "Lemon Meringue Pie sold through most quickly and had the best reviews from our consumers and team members," Sherrard says.

A 2023 Future Market Insights study found that the citrus flavors marketing is thriving, expected to reach nearly \$18.8 billion at a CAGR of 4.9% within the next decade. And according to Tastewise, consumer demand for lemon flavor is rising fastest in the snack category.

To help meet that need, Cincinnati-based newcomer Creamalicious Ice Cream is making lemon one of the stars of its upcoming Bliss Wich line, which will roll out in Q1 2024. In addition to Lemon and Ade —lemon ice cream and swirls between two white chocolate chip cookies — the collection will also include Strawberry Crunch (between two strawberry swirled cookies), and Slap Yo Mama Banana Pudding (with salty caramel and "banilla banana" cookies). All are free of artificial flavors and high-fructose corn syrup.

"You'll never see me do a regular sugar cookie, oatmeal or chocolate chip cookie," says

Creamalicious president and executive chef Liz Rogers. "I don't do things that are [already] on the shelf. I don't want to compete with the giants. I try to bring more innovation to the category with whimsical flavors."

Tillamook County, Ore.-based Tillamook County Creamery



Acme Valley Ice Cream is adding three decadent new flavors — Chocolate Peanut Butter, Raspberry Chip and Salted Caramel — to its premium lineup.










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- Association is also jumping on the citrus trend with its new LTO Orange and Cream variety, introduced in the summer. Other newcomers include Neapolitan and Campfire Peanut Butter Cup. “Our newest offerings put classic flavor combinations front and center, but with a slight twist,” says Ian Moppert, Tillamook ice cream scientist. “We were intrigued to learn that 90% of consumers think classic flavors are important when shopping for ice cream, pointing to a trend of nostalgia-seeking among consumers who crave re-imagined classics.”

BETTER BETTER-FOR-YOU OPTIONS

Despite the craze for classic formulas, better-for-you ice cream and novelty items continue to roll out.

New York-based Enlightened recently launched an upgraded version of its light ice cream, now featuring a Greek yogurt base for added texture, taste and nutritional value.

Boosted with prebiotics and probiotics, Enlightened Greek Frozen Yogurt Pints contain 8 to 10 grams of protein and 150 calories or less per serving plus minimal added sugar (and no erythritol).

Available flavors include Salted Caramel Cookie, Toffee Coffee, Brownies & Cookie Dough, Mint Chip, Kookie Dough and Chocolate Peanut Butter.

“After seeing our customers’ response to our Greek yogurt bars earlier this year, we knew we had to try a pint version,” says Michael Shoretz, Enlightened’s founder and CEO.

On the plant-based front, Craig’s Vegan, West Hollywood, Calif., entered the frozen novelty set in July with Minis in five flavors: Melrose Mint Chip, Kursten’s PB Krunch, Perfectly Chocolate, Sunset & Strawberry, and Killa’ Vanilla. The chef-created, cashew-based, non-GMO flavors come in 3.6-ounce cups.

“As we continue to see increased demand for dairy-free desserts in the frozen novelty space, we’re excited to offer our fans the same decadent ice cream experience in a plant-based and nostalgic mini form — no sharing required,” says founder Craig Susser.

Category newcomer Baris debuts a collection of chocolate-covered raspberries.

Also in the small-portion space, New York-based Chloe’s plans to take its gluten- and dairy-free mini cookie sandwiches national in 2024 after a soft launch earlier this year. The 1.25-ounce, oatmilk-based treats are moist and full of flavor, defying conventional perceptions about plant-based and gluten-free desserts.

“We are satisfying the consumer’s need for conscious indulgences, and delicious, feel-good treats,” says company co-founder and president Chloe Epstein. “Our mini size provides portion control, which is a frequent topic amongst consumers.”

Meanwhile, San Diego-based Planet Based Foods hopes to achieve the best of both worlds with its new organic, vegan hemp-based ice cream line, set to launch in Q2 2024. The line includes four flavors: Vanilla Bean, Chocolate, Coffee Chip and Blueberry Banana Acai.

“Planet Based Foods will offer one of the creamiest



ICE CREAM & FROZEN NOVELTIES

Sales in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined for the 12 weeks ended Aug. 13, according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. Percent change is versus the same period a year ago.

CATEGORY	\$ SALES	% CHG	UNIT SALES	% CHG	VOLUME	% CHG
ICE CREAM/SHERBET	\$1,966,328,154	4.4	433,487,679	-3.6	1,098,699,577	-1.4
ICE CREAM	\$1,706,516,196	3.6	373,143,230	-4.9	949,635,793	-3.0
Private Label	\$363,004,516	6.7	99,039,843	-5.1	343,318,545	-1.1
Häagen-Dazs	\$180,519,990	4.1	36,909,385	1.5	35,770,536	2.5
Ben & Jerry's	\$177,488,844	2.5	36,576,487	-3.0	36,449,606	-3.0
Blue Bell	\$175,490,810	6.5	27,809,034	-3.7	82,454,428	-3.0
Breyers	\$135,370,432	5.5	28,123,001	-8.6	83,490,526	-8.9
Tillamook	\$95,275,219	25.3	18,257,657	14.5	54,461,974	14.9
Dreyer's/Edy's	\$86,825,589	4.8	19,863,575	2.4	58,033,720	7.7
Turkey Hill	\$57,440,544	-18.3	15,038,512	-24.8	43,250,389	-27.9
Talenti	\$48,763,250	-5.7	9,759,533	-14.0	9,759,533	-14.0
Blue Bunny	\$41,101,241	4.4	8,967,664	5.4	26,304,926	5.3
ICE MILK/FZ DAIRY DESSERT	\$108,038,233	28.4	24,730,530	17.4	75,992,323	17.2
For top 10 brand data, see this month's Frozen Databank.						
FZ YOGURT/TOFU	\$85,651,421	-1.3	19,410,377	5.3	37,915,769	17.1
For top 10 brand data, see this month's Frozen Databank.						
SHERBET/SORBET/ICES	\$66,122,304	2.2	16,203,541	-9.7	35,155,694	-8.2
For top 10 brand data, see this month's Frozen Databank.						
FZ NOVELTIES	\$2,157,577,967	3.4	453,574,382	-1.8	752,543,780	-5.0
NOVELTIES	\$1,947,676,976	3.3	409,268,242	-1.9	609,329,295	-2.5
Nestlé	\$299,452,186	7.8	46,576,743	11.0	81,856,154	12.5
Private Label	\$252,169,188	2.3	65,916,702	-5.4	153,151,743	-6.7
Outshine	\$176,103,593	5.2	35,523,404	15.3	37,355,472	12.7
Klondike	\$105,606,020	-8.0	23,078,485	-17.0	36,661,193	-16.6
Häagen-Dazs	\$101,116,692	13.6	24,128,114	8.5	14,426,557	10.3
Yasso	\$78,838,287	24.0	14,153,856	19.2	11,478,661	18.8
Popsicle	\$56,163,267	-13.7	9,698,880	-28.6	16,080,539	-30.3
Blue Bunny	\$55,904,550	-16.9	12,556,787	-16.0	12,869,544	-19.1
Blue Bell	\$53,290,708	-2.1	7,292,424	-6.3	16,384,789	-5.1
Magnum	\$37,733,481	-6.7	7,051,450	-13.9	4,255,920	-13.6
ICE CREAM/ICE MILK DESSERTS	\$95,386,269	4.4	4,411,502	-3.7	13,952,218	-5.7
For top 10 brand data, see this month's Frozen Databank.						
ICE POP NOVELTIES	\$114,514,722	4.0	39,894,638	-0.6	129,262,267	-15.1
For top 10 brand data, see this month's Frozen Databank.						

plant-based ice creams to hit the market,” says CEO Braelyn Davis. “Following the amazing texture and flavor, our ice creams feature planet-friendly ingredients and offer consumers a highly sustainable choice.”

He acknowledges that plant-based pints have lost some momentum due to the failure of many to mimic the texture of traditional dairy ice cream. However, “This is changing as companies get better at refining their products.” A new line of novelties currently in the works is also expected to give the category a boost, says Davis. “I believe the novelties have a chance for an upswing in the segment, as people are looking for convenience. The products that you can simply grab out of the freezer and eat will have a leg up on the competition.”

BITE-SIZE IS THE RIGHT SIZE

David Greenfeld, founder and CEO of Los Angeles-based Dream Pops, agrees that novelties are a winner. In fact, the company recently developed a larger, 8-ounce version of its poppable, superfood- and adaptogen-rich plant-based bites.

“Consumers are looking for more value and larger pack sizes,” says Greenfeld. Expected to debut in January, “Our 8-ounce pouches are designed to give more [product] to our loyal customers, at a much more affordable price point. We believe that novelties and grab and go are the future, and continue to be the focus for most consumers.” As a result, he adds, allocating more room for novelties instead of pints and tubs “is a great strategy for retailers.”

Aman Singh, vp and CEO of Dallas-based Kaurina’s, sees a similar trend. “Since the pandemic, the novelty category seems to be more compelling to consumers because [it offers] portion controlled, snackable sizes,” he says. “It’s not something that’s just reserved for dessert. Now, people are having novelties at all times of the day.... They don’t have to dig out a few scoops at a time, plus [there’s no] freezer burn.” Singh adds that Kaurina’s is working on new flavors of its bars for summer 2024, including on-trend varieties such as saffron, pistachio, and Thai iced tea.

Category newcomer Baris is also bullish on frozen novelties. The Chicago-based company recently launched three different varieties of chocolate-covered raspberries: Extra Dark Chocolate, White & Dark Chocolate, and White & Milk Chocolate. “By using only two ingredients, Patagonian raspberries and the finest chocolate, Baris offers a delightful and elegant frozen treat that caters to growing demand for healthier yet equally delicious indulgences,” says Baris cofounder Marcos Della Pia.

Frozen chocolate covered fruit is the fastest-growing category in frozen novelties (+89.4% versus year ago), according to industry data shared by Chicago-based Diana’s Bananas, which this year extended its line into premium chocolate-covered Banana Bites. ■



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FESTIVE FLAVORS GENERATE CREAMER EXCITEMENT

A bevy of seasonal offerings shine a spotlight on refrigerated coffee creamers. Growing demand for plant-based and organic options is also driving innovation.

BY TIFFINI THEISEN

As home-brewed coffee becomes more popular in the U.S., dollar sales of coffee creamers rose 6.3% to \$969.97 million during the 12 weeks ended Aug. 13, outpacing the refrigerated department as a whole (-0.3%), according to Chicago-based market research firm Circana (circana.com). Unit sales dipped only 1.9%, highlighting coffee lovers' commitment to enhancing their favorite morning brew despite inflation. Among the top 10 brands, Chobani, Dannon, Planet Oat, nutpods and Califia Farms all saw unit sales grow — three by double digits.

PARADE OF FALL FLAVORS

Chobani recently debuted two new limited-time Pumpkin Spice creamers: Oat-Based and Dairy.

It also introduced a dairy version of Peppermint Mocha and a non-dairy Maple Glazed Donut flavor for the holiday season. “Fall beverages are in demand earlier than ever this year,” said chief innovation officer Niel Sandfort in August when Oatmilk Pumpkin Spice rolled out, highlighting the popularity of seasonal offerings.

Lynnfield, Mass.-based HP Hood debuted its limited-edition Planet Oat Gingerbread Oatmilk Creamer in late summer as well. The brand's first LTO creamer, the gluten- and dairy-free newcomer is “designed to generate excitement around the holidays,” says Chris Ross, senior vp of marketing and research and development.

Meanwhile, Los Angeles-based Califia Farms recently rolled out a Target exclusive, Caramel Apple Crumble Oat Creamer. The company is also bringing back Pumpkin Spice Oat Barista for the season. Pumpkin Spice Almond Creamer is also returning through the end of the year.

“Our Pumpkin Spice collection stands out because it is made with real pumpkins grown in the wine country surrounding Walla Walla, Washington,” says Suzanne Ginestro, Califia Farms chief marketing officer.

While fall flavors are always a hit, category leader Nestlé, Arlington, Va., is banking on the nostalgia factor with its new Coffee mate Peanut Butter & Jelly Flavored Duo Creamer. Designed to appeal to the millennial consumer in particular, the offering

blends the saltiness of peanuts with a strawberry jelly flavor.

Flavored coffee creamers are in increasingly high demand, especially among millennials, according to a Technavio report published in late 2022. And Nestlé, citing a March 2023 IRI Market Advantage report, says 53% of Coffee mate buyers switch between flavors, and 56% of them are always on the hunt for new flavors.

“Coffee mate is leaning into providing even more variety by bringing pairs of distinct flavors together,” says Leonardo Aizpuru, vp of brand marketing for Nestlé's beverage division. Peanut Butter & Jelly is only the first of several Duo creamer flavors, he adds. The next mashup hasn't been announced, but it's expected to be available in retail by December.

‘REPLICATING THE COFFEE SHOP EXPERIENCE’

Denver-based Danone North America is also blending sweet and salty with its new Dunkin' Salted Caramel Creamer, rolling out this month. “Younger consumers prefer highly personalized, flavorful coffee beverages, and interest in replicating the coffee shop experience at home also remains alive and well,” says Kallie Goodwin, vp of coffee creamers marketing. Dunkin' restaurants sold out of Salted Caramel Cold Brew in the summer of 2022, she adds. A year later, the chain sold about 6 million of the drinks.

Danone North America's newest holiday SKU, International Delight Peppermint Mocha Zero Sugar Creamer, joins its existing Peppermint Mocha seasonal offering. Along with other International Delight LTOs, including Pumpkin Pie Spice, Pumpkin Pie Spice Zero Sugar, Gingerbread Cookie Dough and Frosted Sugar Cookie, Danone is bringing back its Dunkin' Pumpkin Munchkin Creamer for a second year.

“Our beloved core flavors and LTOs continue to provide a huge variety for consumers to enjoy the coffeehouse experience at home or on-the-go, particularly as the



Nestlé banks on nostalgia and fun with its new Coffee mate Peanut Butter & Jelly Flavored Duo Creamer.



Califia Farms says its new Caramel Apple Crumble Oat Creamer is the first ever plant-based, dairy-free caramel apple creamer.



After Dunkin' restaurants sold out of Salted Caramel Cold Brew, Danone North America introduced Dunkin' Salted Caramel Creamer.

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- demand for at-home premium offerings and desire for customization continues to grow,” Goodwin says.

Creamalicious of Cincinnati is also aiming to satisfy coffee lovers’ desire for exciting new flavors to jazz up their joes. The company specializes in Southern-inspired creamer flavors, including its two latest, Uncle Charles Brown Sugar Bourbon Cake and Bay’bee Lis’sen White Chocolate Blondie.

“We’re trying to change how people enjoy their cup of coffee in the morning,” says president and executive chef Liz Rogers. “We do not do flavors that are already out there on the shelf. You won’t see a vanilla or a salted caramel. Creamalicious is more about innovation and culinary inspired flavors.”

The company’s newest offerings, which Rogers hopes to roll out in 2024, will be modeled after Creamalicious’ existing ice cream flavors Thick As Thieves Pecan Pie and Aunt Poonie’s Caramel Pound Cake. She’s also eyeing a a Quyte Cake (Southern white cake) variety. Rogers describes her creamers as “clean-label, yet decadent” and says they can also be used as ingredients in milkshakes, French toast, cupcakes and more.

SEEKING HEALTH ATTRIBUTES

In addition to crave-worthy flavors, many coffee creamer customers are paying attention to health attributes. “Increasing preference for nutritional and healthy coffee creamers is a major trend in the coffee creamer market. [Consumers] are much more informed and becoming aware of the negative impacts of ingredients such as sugar, fat, and gluten,” according to a Technavio’s 2022 report.

Vegan creamer maker nutpods, Bellevue, Wash., launched zero-sugar Oat Brown Sugar flavor in May after consumer demand for an oat creamer with just a hint of sweetness.



nutpods launched zero-sugar Oat Brown Sugar creamer after consumers asked for “a hint of sweetness.”

“When you think of oats, you can’t help but think of brown sugar, from oatmeal cookies to overnight oats,” explains chief marketing officer Patrick Coyle. “It also happens to be a common flavor present in most coffee roasts, making it a perfect choice for an oat creamer.”

nutpods’ most recent innovation, a dairy-free half & half alternative made with almonds and coconuts, has less than half the calories of traditional dairy half & half, the

company says. The versatile product can be used not only in coffee and tea, but in baking and other recipes. It’s set to launch in January 2024.

At the beginning of the year, Danone North America responded to growing demand for plant-based creamers by launching Silk Mocha Almond Creamer and reintroducing its reformulated, new-look So Delicious Dairy Free French Vanilla Coconutmilk Creamer.

“More and more people are embracing the flexitarian lifestyle, with 47% of Americans describing themselves as flexitarians, and nearly half of those describing the diet as a permanent lifestyle change,” said the company in a statement. “As flexitarianism grows, so too does the interest in plant-based creamers; in the last year, plant-based creamer sales have increased by 27.6%, and plant-based creamers make up 10.6% of the overall creamer category.”

Danone also announced earlier this year that it will expand its So Delicious creamer lineup with a new Sweet & Creamy Coconutmilk Creamer.

ORGANIC & ECO-FRIENDLY DRIVE GROWTH

New Barn Organics, Rohnert Park, Calif., recently began rolling out its new Regenerative Organic Certified Barista

Almond Milk, a product that goes beyond organic to make a positive impact on the environment.

“Organic is already a driver of strong growth in the category, reflecting consumers’ desire for products free from pesticides and chemicals,” explains vp Jasen Urena. But regenerative organic takes it a step further. The designation means the product “supports sustainable farming practices that enrich the soil, enhance biodiversity, and reduce carbon emissions,” says Urena. “So it’s a product that not only tastes great but also contributes to a healthier planet.” ■

CREAMERS

Sales in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined for the 12 weeks ended Aug. 13, according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. Percent change is versus the same period a year ago.

CATEGORY	\$ SALES	% CHG	UNIT SALES	% CHG	VOLUME	% CHG
CREAMS/CREAMERS	\$1,274,806,923	6.3	295,337,242	-1.5	642,443,179	0.5
COFFEE CREAMER	\$969,966,209	6.3	209,408,236	-1.9	474,220,300	0.7
Nestlé	\$482,620,207	2.6	92,634,481	-5.8	222,113,335	-1.2
International Delight	\$215,687,702	9.4	49,022,834	-0.6	115,205,512	3.4
Private Label	\$98,717,330	0.2	30,920,999	-6.0	68,940,297	-5.4
Silk	\$53,030,101	2.8	10,415,526	-3.4	20,830,373	-3.4
Chobani	\$41,564,199	70.7	8,752,037	58.0	13,128,056	57.8
Dannon	\$21,702,017	11.0	5,057,023	3.1	10,668,111	4.5
Planet Oat	\$16,454,636	31.1	3,914,067	28.0	7,828,134	28.0
nutpods	\$12,601,813	16.7	2,273,918	14.5	3,609,375	14.5
Califia Farms	\$11,416,492	6.8	2,303,860	7.6	3,720,746	-0.4
Blue Diamond	\$3,082,543	-19.2	754,103	-19.8	1,508,206	-19.8
DAIRY HALF & HALF	\$264,759,967	6.2	76,408,191	-0.8	155,898,744	-0.4
DAIRY CREAM	\$40,080,748	6.1	9,520,815	1.3	12,324,135	1.8

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BREAKFAST DOESN'T RISE, BUT IT STILL SHINES

Recipe reinventions and innovations fuel consumer interest in frozen entrees, waffles and handhelds. But unit growth remains elusive.

BY **MARIANNE WEAVER**

Dollar sales of frozen breakfast foods increased 1.9% during the 12 weeks ended Aug. 13 (versus the same period a year ago) to \$1.18 billion, reports Chicago-based market research firm Circana, formerly IRI and The NPD Group. However, units and volume fell 5.7% and 5.3%, respectively, as cash-strapped consumers cut back on purchases. Still, there were a few bright spots, particularly among smaller, challenger brands such as Sandwich Bros. of Wisconsin, Red's, Kodiak and Veggies Made Great, among others. Private label entrees and bagels also fared well as did Kellogg's handhelds and entrees.

Prevailing trends in this category have centered around health-conscious choices, global flavor profiles, and savory breakfast options, all while emphasizing convenience, says Cassandra Allen Buckley, marketing director for Rahway, N.J.-based Veggies Made Great.

"Consumers are increasingly seeking better-for-you products, characterized by ingredients that are nutritionally sound, reduced sugar content, and lower calorie counts," she reports. "There's also growing demand for vegan and gluten-free alternatives as consumers explore dietary options."

As a result, innovations and renovations are happening throughout the frozen breakfast category. From added protein to better handhelds to more indulgent — yet convenient — offerings, consumers have a wide array of choices to kick-start their mornings (and afternoons and evenings).

HANDHELDS HIT THE SPOT

Consumers on the go have some new flavor options this fall. From indulgent cheesy goodness to protein-packed patties and taquitos with a twist, manufacturers are introducing flavor combos to please every palate.

For those with a few extra minutes to spare in the morning, Veggies Made Great is introducing two components for creating the perfect breakfast sandwich: Egg Patties and Cornbread. "Our Egg Patties are a natural extension of our current frozen frittata offerings and are designed to elevate a traditional breakfast sandwich with

a healthier, veggie-packed option," says Buckley. Expected to hit the market this month, the product is available in three flavors: Garden Vegetable, Veggie Bacon and Southwest.

The kosher, gluten- and allergen-free Cornbread, also available beginning this month, comes in two flavors, Homestyle and Jalapeno.

Veggies Made Great is also expanding its frittata lineup, which was first introduced in 2018. Like the rest of the collection, newcomers Tomato Basil and Huevos Rancheros contain 80 calories and 5 grams of protein per serving. The Tomato Basil variety lists tomatoes as its first ingredient, followed by cauliflower, zucchini and mozzarella cheese. The Huevos Rancheros flavor lists a cauliflower, zucchini and tomato blend as its first ingredient, followed by black beans, jalapeno peppers and white cheddar cheese. Gluten-free and allergen-friendly, the 2-ounce frittatas can be easily prepared in a microwave or air fryer until heated through, says Buckley.

Swaggerty's Farm, Kodak, Tenn., is also expanding its frozen breakfast lineup, adding two new breakfast sandwiches to

its collection: Chicken & Waffle and Chicken & Buttermilk Biscuit. "Chicken sandwiches are a popular item at many quick-service restaurants," says national sales manager Dan Turner. "So our customers are excited to have these two new offerings." The sandwiches are expected to hit grocers' freezers late in the fourth quarter.

While some category players are experimenting with new flavors, Dinuba, Calif.-based Ruiz Foods, maker of the El Monterey brand, recently debuted a new carrier. "We know consumers have preferred flavors when it comes to their breakfast, but they are always looking for variety [in terms of] product form," says Linda Pinzon, associate brand manager of the retail business unit. To mix it up a bit, the company developed a Breakfast Egg, Bacon & Cheese Taquito.

"Taquitos are a unique and fun way to indulge in a familiar flavor with a classic Mexican twist," she explains. "New forms attract new consumers and provide loyal breakfast buyers with an exciting and sharable experience that is still easy to take on the go."

Another new handheld breakfast option comes from Denver-based Lily's Toaster Grills. In 2019, ▶



Veggies Made Great broadens its frittata lineup with two new flavors: Tomato Basil and Huevos Rancheros. Each frittata is 2 ounces.



Lily's Toaster Grills expands its grilled cheese sandwich line to include two breakfast flavors.



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- ▶ the company introduced a frozen grilled cheese sandwich that can be heated in the toaster. Five years later, it's entering the frozen breakfast sandwich category with two flavors: Sausage, Egg & Cheese and Egg & Cheese.

"We saw an opportunity to extend our patented frozen sandwich technology to transform frozen breakfast sandwiches," says CEO Rob Hearne. "Our innovation pipeline

The better-for-you frozen breakfast segment is growing at twice the rate of conventional.

includes several additional varieties that we are excited to bring nationwide in 2024," he adds.

In January 2024, the breakfast sandwich category will welcome yet another new player, Boulder-based Rudi's Rocky Mountain Bakery. "We know busy consumers are looking for the trifecta of nutritious, delicious and convenient, so we saw an opportunity to extend our baking heritage into breakfast sandwiches," says CEO Jane Miller, who believes bread is the weak link in most frozen breakfast sandwiches. "So we started with our Rudi's Sourdough English Muffins and our Rudi's Gluten Free Brioche Buns," she reports. Inside the sandwiches are frittatas made with cage-free eggs and cheese topped with minimally processed bacon or sausage.

PROTEIN-PACKED WAFFLES

A growing number of consumers are prioritizing health and wellness, reports Junea Rocha, co-founder and CMO of Brazi Bites, Portland, Ore. As a result, the better-for-you frozen breakfast segment is growing at twice the rate of conventional.

"As part of that, there is growing demand for gluten-free and protein-focused waffles," she continues. In fact, "In 2021, mainstream frozen waffle sales declined while better-for-you sales grew, with the number of households up (+7%) and dollar sales per household also up (+16%) versus 2020." Add to that growing demand for breakfast throughout the day, and consumers were more than ready for Brazi Bites' three new protein-packed, gluten-free frozen waffle SKUs: Homestyle, Blueberry and a unique savory variety, Cheesy.

"We lean heavily on consumer insights to innovate and optimize assortment," says Rocha. "Our Cheesy Waffle was inspired by the viral 'will it waffle' trend, where consumers enthusiastically waffled our Brazilian Cheese Bread. This approach helps us continue to meet con-

sumer demand and stay ahead of trends." Brazi Bites' new lineup hit the freezers at Sprouts Farmers Markets nationwide last month.

New York-based Banza, known for its chickpea-based pastas and pizzas, introduced its first breakfast product, gluten-free Banza Protein Waffles, last month at Whole Foods. "Our customers have been telling us that breakfast is a pain point, and they would like an option that is delicious, nutritious and convenient," says Brian Rudolph, Banza co-founder and CEO. "By making a waffle from chickpeas, we can deliver on all three."

'Busy consumers are looking for the trifecta of nutritious, delicious and convenient.'

Available flavors include Chocolate Chip, Blueberry and Homestyle, all with 10 grams of protein per serving.

Groveport, Ohio-based Lopaus Point is also jumping on the protein trend. After repeated requests from customers for high-protein breakfast waffles, it rolled out three limited-edition flavors: Pumpkin Chocolate Chip, Confetti and Strawberry. The response to the Strawberry flavor was so overwhelming that it's been added to the regular lineup, says founder and CEO Stacie Skinner.

For Spring 2024, "We have two savory waffles planned [that pair well with] toppings like smoked salmon, charcuterie, etc.," she adds. "We also have a classic muffin-inspired flavor coming."

CONVENIENT AND CLEAN

Angi Rassi, chief marketing officer at Franklin, Tenn.-based Red's All Natural, says consumers want solutions that are convenient, delicious and made from high-quality, clean ingredients. To meet that demand, the company is introducing Breakfast Pizza Snacks. "We top a tasty artisan crust with a delicious blend of antibiotic-free turkey sausage, cage-free scrambled eggs, and a yummy



Rudi's Rocky Mountain Bakery debuts frozen breakfast sandwiches featuring its own gluten-free brioche buns and sourdough English muffins.



Brazi Bites launches a line of protein-packed, gluten-free waffles, including a savory Cheesy flavor.





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Applegate Naturals introduces a pair of humane-certified Frittata Bites ready to eat in three minutes.

- ▶ rBST-free cheese sauce,” she says. Currently available at Sprouts, the product is ideal for busy families looking for easy solutions in the morning, at lunch and after school.

Applegate Naturals, Bridgewater, N.J., is also entering the clean label frozen breakfast segment. “Our consumers want convenience in the morning, without sacrificing quality or protein,” says Moy Aras, Applegate brand manager. “There’s more education than ever about the benefits of starting your day with a clean breakfast, so we’re excited to launch Applegate Naturals Frittata Bites and move the brand into a new category.”

The Bites come in two varieties: Egg & Uncured Bacon and Egg, Chicken Sausage, Red Pepper, Onion and Spinach. Both are made with Applegate humanely raised meat, certified-humane eggs and 100% natural, non-GMO ingredients. Each serving of two Frittata Bites provides 13 to 19 grams of protein and contains 0 to 1 gram of sugar. Ready-to-heat and -eat

Bagelista offers a line of clean label, take-and-bake bagels that deliver New York bagel shop flavor.



FROZEN BREAKFAST FOODS

Sales in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined for the 12 weeks ended Aug. 13, according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. Percent change is versus the same period a year ago. Only brands with at least \$1 million in sales during the period are listed.

CATEGORY	\$ SALES	% CHG	UNIT SALES	% CHG	VOLUME	% CHG
FZ BREAKFAST FOOD	\$1,178,265,768	1.9	239,095,527	-5.7	243,509,958	-5.3
HANDHELD BREAKFAST	\$579,219,895	1.6	88,034,280	-7.5	108,845,012	-6.1
Jimmy Dean	\$351,960,910	4.3	38,212,621	1.4	61,323,026	-1.6
Private Label	\$57,164,709	6.5	11,894,322	-11.0	12,844,176	-3.8
Pillsbury	\$40,828,760	-5.3	11,519,775	-21.6	10,832,661	-16.8
El Monterey	\$31,031,642	-20.3	6,777,630	-22.6	6,615,014	-23.8
Odom's Tennessee Pride	\$28,847,447	4.6	3,488,205	-13.6	5,414,175	-12.2
Kellogg's	\$11,107,511	29.3	3,406,885	28.4	2,704,456	28.4
Hot Pockets	\$10,276,827	-4.4	2,246,559	0.7	1,741,236	-12.3
Sandwich Bros. of Wisconsin	\$7,742,111	21.8	1,111,864	22.7	1,180,558	15.4
Red's	\$7,412,743	31.7	2,459,604	14.2	890,024	27.7
Tina's	\$5,712,918	-19.8	1,122,078	-36.7	1,382,240	-26.8
WAFFLES	\$285,415,029	2.6	70,147,286	-6.9	70,690,010	-7.4
Kellogg's	\$196,354,549	2.1	47,991,813	-6.2	48,987,229	-10.3
Private Label	\$39,770,736	10.9	12,902,997	-5.6	13,583,592	-6.2
Kodiak	\$27,623,101	7.5	4,622,933	7.1	3,461,036	6.6
Van's	\$8,196,894	-16.7	2,155,872	-17.3	1,239,843	-19.0
Hungry Jack	\$4,870,944	569.5	488,111	568.8	2,260,588	568.8
Kashi	\$2,260,783	-23.3	508,435	-24.7	333,673	-24.4
Nature's Path	\$1,962,372	-26.2	511,049	-34.3	236,718	-34.3
Annie's	\$1,037,989	-3.6	227,970	-16.9	139,632	-16.9
BREAKFAST ENTREES	\$269,888,327	3.2	72,665,913	-0.6	54,361,245	-0.3
Jimmy Dean	\$127,077,786	-0.9	35,492,010	-5.5	17,888,141	-6.9
Private Label	\$36,558,455	25.7	11,984,411	15.8	9,816,435	12.0
De Wafelbakkers	\$27,759,914	10.9	6,542,959	8.2	11,499,107	8.9
Kellogg's	\$21,442,045	23.0	5,774,465	17.2	5,425,455	19.2
Hungry Jack	\$9,117,574	2.4	1,757,195	2.9	3,165,507	-3.6
Egglad's Best	\$7,958,561	4.9	1,153,832	-0.9	852,590	-0.6
Pillsbury	\$7,113,667	-20.8	1,613,621	-30.1	1,047,145	-29.2
Smart Ones	\$5,136,848	1.7	2,102,796	-4.1	852,894	-4.1
Sambazon	\$4,338,875	12.0	1,249,207	15.2	476,323	15.2
Kodiak	\$4,268,803	14.6	728,565	14.7	700,370	14.7
OTHER BREAKFAST FOOD	\$27,323,038	-13.8	4,742,534	-26.2	6,681,580	-12.3
Private Label	\$15,513,249	13.4	2,983,078	-7.0	5,304,264	3.0
Jimmy Dean	\$5,554,454	-22.3	679,626	-29.1	509,678	-27.1
Garden of Eatin'	\$4,365,813	-9.3	709,013	-13.3	531,759	-13.3
MUFFINS	\$9,556,463	14.3	1,554,544	8.8	1,155,093	11.6
Garden of Eatin'	\$8,043,452	9.8	1,276,650	3.2	974,064	5.4
BAGELS	\$5,051,537	-1.3	1,601,085	-1.0	1,602,075	6.9
Private Label	\$1,397,983	21.4	447,829	34.8	527,449	29.2
Ray's New York Bagels	\$1,077,080	16.0	261,053	8.0	366,658	9.1
EGG SUBSTITUTES	\$1,811,479	32.0	349,884	11.5	174,942	11.5
JUST	\$1,811,479	32.0	349,884	11.5	174,942	11.5

within three minutes, the product debuted at Sprouts in July, with a broader retail rollout planned through the end of the year.

Another player in the clean label space, Wellesley, Mass.-based Good Food Made Simple, replaced its old steel-cut oatmeal with Oats Plus earlier this year. The product is available in four even-better-for-you flavors: Unsweetened, Cinnamon Vanilla, Banana and Strawberry.

“We upped the nutrition profile by combining oats, buckwheat groats and flax,” says Sarah Kesseli, director of content marketing. “Oats Plus is offered in ready-to-eat cups, perfect

for a quick breakfast,” she adds. “Plus, it’s gluten-free, vegan, non-GMO, and contain 28 grams+ of whole grains per serving.”

GOOD VIBES AT BREAKFAST

While good nutrition is important, consumers want to start the day on a high note by eating foods that also evoke positive emotions. “Today’s consumer wants to

live a healthy lifestyle but also indulge in authentic, meaningful experiences with their food,” explains Warren Wilson, co-founder of New York-based Bagelista. In response, the company created a clean label, take-and-bake frozen lineup inspired by the bagels sold in New York bagel shops. Available flavors



General Mills introduces Pillsbury waffles in three classic cereal flavors: Cinnamon Toast Crunch, Trix and Cocoa Puffs.

include Plain, Everything, Sesame and Cinnamon Raisin.

Good Food Made Simple also offers a healthy twist on a beloved breakfast food. “Our new Brioche French Toast caters to those who want the experience of true comfort food [that they can also] feel good

Post Consumer Brands extends its Pebbles cereal brand into the frozen waffles category.



about eating any day of the week,” says Kesseli. The product is currently available at Market Basket but will be presented to several other retailers in the upcoming months.

Of course, nothing makes grown-ups feel more nostalgic than the cereal they enjoyed as a kid. This fall, Minneapolis-based General Mills is debuting three Pillsbury waffle SKUs in classic cereal flavors: Cinnamon Toast Crunch, Trix and Cocoa Puffs. Meanwhile, Lakeville, Minn.-based Post Consumer Brands added Pebbles cereal-inspired waffles to its lineup.

“Pebbles cereal fans are always looking for new ways to experience their favorite cereal,” says Joe Christenson, Pebbles senior brand manager. “We’ve seen fans get creative by mixing Pebbles cereal into waffles and other breakfast recipes, so we were inspired to launch Pebbles Waffles for a fun, easy way to enjoy the iconic flavor of Pebbles cereal.” He adds, “Pebbles brand is nostalgic for so many of today’s parents who are loving introducing their favorite childhood cereal to their own kids.” The waffles are available in both Fruity and Cocoa Pebbles. ■

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FROZEN DINNERS & ENTREES COOL DOWN

The multi-serve segment is holding its own, but single-serves are struggling as consumers look for ways to cut costs.

BY DENISE LEATHERS

Dollar sales of frozen dinners/entrees slid 1.0% during the 12 weeks ended Aug. 13 to \$2.87 billion across channels, underperforming the frozen department as a whole (+1.6%), according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. A significant increase in volume sold with merchandising support (up 8.7 points in one year to 21.5%) may have kept dollar growth in check. But it did little to boost unit sales, which fell 6.8% during the period — again, well short of the department average (-3.9%).

SINGLE-SERVE UNITS DOWN 7.6%

There were some bright spots, but they were few and far between. In the single-serve segment, which saw the biggest dollar (-2.9%) and unit (-7.6%) losses, Nestlé's Stouffer's and Lean Cuisine brands, Nos. 1 and 4, respectively, both registered unit growth. (To be fair, though, both enjoyed big bumps in merchandising support). Meanwhile, in handheld entrees, Smuckers, El Monterey and State Fair all posted unit gains. And in the multi-serve segment, Banquet (+12.0%) and InnovAsian (+13.7%) both put up double-digit unit gains. While Banquet appeals to cash-strapped consumers trying to feed their families for less, InnovAsian is likely grabbing some shoppers who are cutting back on Chinese takeout — since food-away-from-home prices are rising faster than food-at-home prices.

So why isn't the rest of the category seeing the same gains? "With inflation hitting everyone, I believe families are choosing to cook more from scratch," says Larry Avery, CEO of Big Easy Foods, Lake Charles, La. That said, products that stand out in the crowded category — whether premium, ethnic, clean label or budget-friendly — seem to have a leg up on the competition. "Being different and interesting is what our retailers are looking for," he confirms.

"We were asked to bring some mainstream entrees into the heat-and-eat category made with fresh,

Available exclusively at Walmart, the By Chef Ramsay collection features eight recipes created by Gordon Ramsay himself.



Big Easy Foods' new Simple Solutions lineup offers authentic Cajun flavor and fresh, all-natural ingredients.

all-natural ingredients," including the company's wild caught gulf shrimp, says Avery of Big Easy's new Simple Solutions lineup. Packed with Cajun flavor for consumers interested in exploring regional dishes, the line includes: Shrimp Scampi, Shrimp Jambalaya, Shrimp & Black Beans, Shrimp with Butter & Garlic, Shrimp Alfredo, Shrimp Alfredo with Broccoli, and one non-shrimp dish, Chicken Alfredo.

Global cuisine is also in demand, reports Jack Acree, executive vp at Saffron Road, Stamford, Conn., which continues to expand its ethnic-heavy, clean-label lineup. Coming soon are Korean Fire Grilled Chicken, Thai Drunken Noodles and Mexican Adobo Chicken. What's not in demand? More meals made with plant-based substitutes. "[Too many plant-based meals] took up valuable

'With inflation hitting everyone, I believe families are choosing to cook more from scratch.'

real estate from items that sell much better and likely would have

kept the category in positive territory," says Acree.

But there's always room for more better-for-you brands. In fact, retailers are anxiously awaiting the debut of a new line from Austin, Texas-based Blue Zone Kitchens, which offered a sneak peek at last month's Natural Products Expo East. "Crafted for longevity" with beans, veggies, grains and spices, the frozen meals are inspired by the food principles discovered in blue zones — regions of the world with unusually high percentages of centenarians. Products listed on the brand's website include Burrito Bowl, Heirloom Rice Bowl, Sesame Ginger Bowl and Minestrone Casserole.

CELEBRITY CHEFS ADD CACHET

While the category has welcomed its fair share of restaurant brands, Walmart is adding a pair of celebrity chef brands to its frozen entrée set. Last month, it launched a line of meals from Chef Gordon Ramsay

of Hell's Kitchen fame, followed by a collection of Flavortown dishes from Chef Guy Fieri, both exclusive to the chain.

Described as "a true turning point for frozen food," the By Chef Ramsay lineup features eight iconic recipes designed to bridge the gap between dishes seen on TV and in the chef's restaurants and typical frozen entrees. ▶





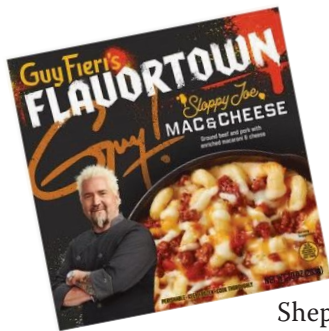
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Another Walmart exclusive, Flavortown, includes four dishes from celebrity chef Guy Fieri.

- ▶ They include Lasagna, Four Cheese Macaroni Bake, Chicken Pot Pie, Mushroom Risotto, Lemon Caper Chicken,

Shepherd's Pie, Slow Roasted Beef, and the chef's famed Fish & Chips. The meals are manufactured by Golden West Food Group, Vernon, Calif.

The Guy Fieri Flavortown collection includes Sloppy Guy Mac & Cheese, Pepperoni Pizza Lasagna, and both Sweet & Sour Pork and Chicken Enchilada Bowls. They're currently selling for \$5.94.

The category also welcomed another big name last month, but this one came from the refrigerated set. Kraft Heinz, Pittsburgh and Chicago, expanded its Lunchables brand into the frozen aisle with Lunchables Grilled Cheesies. Prepared in the microwave, the frozen grilled cheese sandwiches are the first to utilize a new technology called 360CRISP, which produces pan-like crispiness straight from the microwave. However, the company says it will expand the innovation to four more products across the Kraft Heinz portfolio by the end of 2024.

"Current frozen kid-friendly sandwich options fall short in texture and preparation," says Michael Petruzzi, associate director of disruptive innovation at Kraft Heinz. "We saw an opportunity to develop a platform for the microwave that creates crispy, crunchy products like you get on the stove." He adds, "[We're] providing a convenient snack option that... kids [can] independently prepare in the microwave

— no pans or stove necessary." And no trade-off between quality and convenience. "We see [this] as a key growth opportunity for the frozen aisle," says Petruzzi.

Lunchables Grilled Cheesies are available in two flavors, both made with Kraft Singles: Original and Pepperoni Pizza.

MORE COMFORT FOOD

Another new comfort food offering that blurs the line between meal and snack comes from the Tillamook County Creamery Association, Tillamook, Ore., which recently rolled out a trio of Mac & Cheeses made with

its own award-winning cheese. Available varieties include Classic Cheddar, Sharp Cheddar & Uncured Bacon and Cheddar & Hatch Chile, all offered in both single- and multi-serve sizes.

"At the Tillamook Creamery, we serve the most decadent Mac & Cheese you've ever enjoyed," says senior director of R&D Steve Marko. "It's become a staple on our menu, and folks travel from miles around to get a taste. We couldn't be more excited to bring that very special, sought-after recipe to the masses with our new line of [frozen] Mac & Cheese." ■



Kraft Heinz expands its Lunchables brand into the frozen department with a new line of Grilled Cheesies, the first to utilize its 360CRISP technology.

FROZEN DINNERS & ENTREES

Sales in supermarkets, drugstores, mass merchants, military commissaries and select club and dollar stores combined for the 12 weeks ended Aug. 13, according to Chicago-based market research firm Circana (circana.com), formerly IRI and The NPD Group. Percent change is versus the same period a year ago.

CATEGORY	\$ SALES	%CHG	UNIT SALES	%CHG	VOLUME	%CHG
FZ DINNERS/ENTREES	\$2,868,883,362	-1.0	655,189,321	-6.8	609,163,115	-5.1
SINGLE-SERVE DINNERS/ENTREES	\$1,327,781,593	-2.9	379,503,148	-7.6	255,888,744	-7.2
Stouffer's	\$240,102,720	2.2	64,033,353	6.1	47,047,136	5.3
Healthy Choice	\$163,972,923	-6.0	45,540,481	-6.9	27,608,585	-6.9
Marie Callender's	\$149,337,760	-4.0	43,288,739	-9.2	33,007,421	-9.1
Lean Cuisine	\$126,954,030	-2.8	37,878,583	2.1	22,159,749	0.7
Banquet	\$101,754,302	-0.3	44,269,678	-5.3	30,375,908	-7.2
Amy's	\$84,962,822	-4.1	14,057,541	-15.0	8,151,157	-15.0
Hungry Man	\$51,219,098	-10.9	12,083,820	-16.9	11,912,464	-16.7
Michelin's	\$42,285,401	-12.1	29,033,631	-30.3	14,676,486	-28.5
InnovAsian	\$36,149,251	-2.0	5,596,929	-4.1	6,041,014	-2.0
Smart Ones	\$29,139,751	-2.0	12,165,544	-6.0	6,871,613	-6.0
HANDHELD ENTREES (NON-BREAKFAST)	\$856,393,806	1.5	161,846,669	-5.2	180,114,040	-3.5
MULTI-SERVE DINNERS/ENTREES	\$551,314,181	1.1	61,985,844	-2.3	138,288,626	-1.0
Stouffer's	\$195,571,223	0.8	17,472,160	-1.0	51,175,292	-2.4
Birds Eye	\$83,094,042	4.7	10,494,386	0.2	23,377,602	5.4
Private Label	\$46,642,342	12.1	4,761,994	0.9	12,801,734	4.4
P.F. Chang's	\$38,373,234	-10.9	4,551,042	-9.4	6,344,743	-9.7
Bertolli	\$31,806,314	-14.5	3,484,321	-15.7	5,450,495	-15.0
Banquet	\$18,162,047	23.1	4,803,613	12.0	8,036,296	11.9
On-Cor	\$17,315,870	7.8	4,204,293	0.4	7,069,055	0.0
InnovAsian	\$14,574,175	15.7	1,387,256	13.7	3,126,689	19.4
Marie Callender's	\$14,341,630	-6.6	2,081,491	-12.3	3,606,567	-11.7
Michael Angelo's	\$13,919,748	-17.6	1,435,228	-15.0	2,936,372	-21.3

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VARIETY-SEEKERS TURN TO MEXICAN FOOD

Tired of the same old, same old, younger consumers in particular are seeking frozen and refrigerated options with a little Latin flair.

BY **MARIANNE WEAVER**

Thanks to a 4.5% increase in units, dollar sales of frozen Hispanic foods in conventional outlets jumped 5.6% during the 12 weeks ended Aug. 13 to \$324.88 million, reports Chicago-based market research firm SPINS. However, the growth was driven primarily by a 48.9% jump in frozen novelties sales (to \$50.73 million). The segment's largest category, frozen appetizers, saw its dollar sales edge up just 1.5% to \$164.78 million in the face of flat unit sales. Still, that's much better than the frozen department as a whole, which saw units fall 3.9%.

That's partly because consumers are tired of the same old, same old, says Todd Martin, co-founder of Tucson, Ariz.-based Tucson Foods. "People are looking for more variety... [So] ethnic foods, and especially Mexican foods, are loved by everybody." In fact, Datassential's 2023 Mexican Food Trends Report finds that Mexican is the preferred ethnic cuisine of both Millennials and Gen Z.

Consumption of Mexican cuisine is also increasing due in part to the availability of high-quality refrigerated and frozen options, says Michelle Canellopoulos, senior director of marketing and insights at MegaMex Foods, Orange, Calif. "The versatility and personalization of Mexican food options are factors here too, with tacos and burritos being the perfect blank canvas for customization," she adds. As a result, "Over 70% of consumers say they eat Mexican food often, with just over half reporting that they make it at home frequently." But manufacturers aren't resting on their laurels.

BUILDING A BETTER BURRITO

Indeed, there's a move afoot to create "better" burritos with cleaner labels, creative ingredients and/or more affordable price points. To that end, Amy's Kitchen, Petaluma, Calif., just launched to-go multi-packs ideal for families facing busy fall schedules. The new size is available in two flavors — Bean, Rice & Cheese and Non-Dairy



Amy's Kitchen launches burrito multi-packs ideal for families with busy fall schedules.

view on what makes a burrito better...and it's not more expensive fillings. "Tina's customers are not asking for better-for-you ingredients," says Chari Lavrack Cross, chief communications officer and director of digital marketing. "They want convenience, comfort and consistency at a great price."

She points to 26-week Nielsen data for the period ending Sept. 2, 2023, which shows the premium frozen burrito category down 17% versus a loss of only 5% for the value frozen burrito category.

The premium frozen meals category was down 8% as well. "Consumers are not supporting the premium burrito category," says Cross. "It's taking a big hit, whereas value frozen burritos are performing in line with the total frozen category." She adds that the refrigerated burrito category is down only 1.4%. So that's where Tina's is focusing its efforts.

"We created Tina's Big Burrito for the refrigerated deli section of grocery stores, and it has become our biggest

Bean & Rice — both made with organic and non-GMO ingredients.

Meanwhile, San Diego-based Planet Based Foods is rolling out a better burrito lineup made with superfood hemp. "We saw there was room for a cleaner label and a more ethical option in the space," says CEO Braelyn Davis. "These burritos are rich in nutrient-dense ingredients, including hemp, which is fortified with omega fatty acids as well as high in protein." He adds, "The products are also incredibly sustainable to produce." Available varieties include Pizza, BBQ, Fajita and Breakfast. Planet Based Foods is also introducing a new BBQ Chimichanga, says Davis. (Chimichangas are the one frozen snack that actually saw unit sales grow during the most recent 12 weeks, +0.6%.)

While many manufacturers are taking the healthy route, Tina's Burritos, Vernon, Calif., has a different

'We saw there was room for a cleaner label and a more ethical option in the burrito space.'



Planet Based Foods debuts a more sustainable, better-for-you burrito lineup made with hemp — plus a BBQ Chimichanga.

FROZEN MEXICAN FOOD

Sales in supermarkets, drugstores and select mass merchants (including Walmart), club stores, dollar stores and military commissaries (MULO) for the 12 weeks ended Aug. 13, according to Chicago-based SPINS. Percent change is versus the same period a year ago. Only select categories, subcategories and product types are shown.

CATEGORY	\$ SALES	% CHG	UNIT SALES	% CHG
TOTAL FZ MEXICAN FOODS	\$324,880,350	5.6	76,697,807	4.5
FZ APPETIZERS & SNACKS	\$265,885,348	0.3	64,267,581	-0.0
APPETIZERS & SNACKS	\$164,776,488	1.5	30,293,531	0.0
Chimichangas	\$42,672,080	2.4	14,515,431	0.6
Tacos/Taquitoes/Flautas	\$121,945,724	1.3	15,749,455	-0.5
BURRITOS & POCKETS	\$101,095,023	-1.7	33,971,753	-0.1
Breakfast Burritos	\$25,629,712	-3.4	5,884,263	3.9
Meat Burritos	\$59,105,257	-0.5	22,378,550	0.0
Non-Meat Burritos	\$15,182,148	-2.6	5,567,088	-4.0
FZ ICE CREAM & NOVELTIES	\$51,332,047	48.6	10,959,011	44.9
NOVELTIES	\$50,726,854	48.9	10,819,439	45.2
Ice Cream Bars/Pops	\$42,787,228	45.2	8,698,524	40.6
Other Bars/Pops	\$7,253,359	69.8	1,975,622	65.9
FZ ENTREES	\$3,065,567	-5.9	603,697	-5.2
FZ FRUITS & VEGETABLES	\$3,024,301	1.2	671,338	-2.3
FZ BREAKFAST FOODS	\$1,308,599	-5.5	154,013	-7.2

leader in new sales,” reports Cross, adding that the 9-ounce product costs just a little more than a dollar. “Customers love having the flexibility to take the refrigerated product home and cook it in half the time or, if they don’t get around to it, throwing it into their freezer,” she says. “It’s the ultimate in convenience, and Millennials and Gen X are the key demographic driving the sales.”

Last month, the company launched Tina’s Pizza Burrito in refrigerated deli. “We had a 4-ounce frozen Pizza Burrito that was discontinued three years ago, but many customers wrote to us pleading for us to bring it back,” says Cross. “Pizza is such a huge market, and our new 6-ounce Tina’s Pepperoni Pizza Burrito and Supreme Pizza Burrito are an even more convenient way to enjoy it! It’s really the only big innovation in our category, and it taps into the pizza consumer along with the burrito consumer.”

MORNING, NOON AND NIGHT

Of course, Mexican food isn’t just for lunch and dinner. So manufacturers are creating options to satisfy consumer cravings all day long. With that in mind, Dinuba, Calif.-based Ruiz Foods created El Monterey Breakfast Egg, Bacon and Cheese Taquitos. “We know consumers have preferred flavors when it comes to breakfast, but they are always looking for variety in terms of product form,” says associate brand manager Linda Pinzon. “Taquitos are a unique and fun way to enjoy familiar

flavors with a classic Mexican twist.

“Breakfast is a habitual occasion,” she continues. “Consumers are looking for variety to add into their rotation of standard frozen breakfast products.”

Tucson Foods is targeting a different eating occasion with its launch of bite-size Mexican snacks. The company’s new Tamales Bites are hitting supermarkets this month and will be followed by other Mexican bites in the next six to 12 months. “Snacks and appetizers are always popular and great for after school, substitute dinners, weekends and get-togethers,” says Martin.

However, he cautioned industry innovators from following trends, especially in the plant-based segment. “Vegan will always be an item,” he says. “But a lot of plant-based products are highly processed and highly priced. If you’re going to do plant-based, do it with real plants, not

processed, and make sure it is priced competitively with non-plant items.”

In the entrees category, Stamford, Conn.-based Saffron Road is seeing an uptick in sales of its Chicken Enchiladas Poblano, especially in natural retailers. “We know that there is very little chicken- or beef-based

Mexican that also meets natural section requirements,” says executive vp Jack Acree. As a result, the company is also introducing Chicken Enchiladas al Chipotle, a revised version of what was originally a vegetarian offering. Another new Mexican entrée to watch for: Adobo Chicken. “There is good whitespace for Mexican in better-for-you frozen entrees,” says Acree.



Tina’s targets both pizza and burrito lovers with its new refrigerated Pizza Burrito, available in both Pepperoni and Supreme.

TARGETING HOME COOKS

Austin, Texas-based Somos launched two Target-exclusive Burrito Bowl Kits nationwide last month.

“One of our goals with Somos is to get American consumers cooking Mexican food in their home kitchens with the same ease as when they grab a box of pasta and a jar of marinara sauce to cook Italian food,” says co-founder Miguel Leal. “Our Burrito Bowl Kits are the perfect solution to help people get comfortable cooking delicious Mexican food that showcases the richness of Mexican cuisine without spending hours in the kitchen.”

Available in two varieties (Salsa Verde Burrito Bowl and Smoky Chipotle Burrito Bowl), each kit includes everything needed to cook two complete meals in the microwave or stovetop in under five minutes. They also feature a QR code that takes customers to videos of Leal and his mother preparing the kits together in her Monterrey, Mexico kitchen. ■

DIESEL DÉJÀ VU ALL OVER AGAIN

The industry, which has struggled with seasonal jumps in fuel costs in recent years, is back at it as diesel fuel prices have steadily increased since June.

BY **GEORGE ANDERSON**

Moderately higher fuel demand and constrained supplies are expected

to increase prices further, almost certainly through the fourth quarter — if not into the new year. This sets up a challenge if you're looking to mitigate rising costs. And it comes at a time when consumers are rethinking shopping behaviors in light of their own financial challenges.

\$4.63/GALLON AND RISING!

The federal Energy Information Administration (EIA) put the national average for a gallon of diesel fuel at \$4.633 for the week ended Sept. 18, 2023, down 33 cents from Sept. 19, 2022, but on a steady uptick since this June. Growing concerns about the potential for diesel to go higher have been tied mainly to decisions by Saudi Arabia and Russia to extend production cuts through the end of 2023. This comes even as inventories of distillate fuels, which include diesel and home heating fuel, were down by 16% in August compared to the 10-year seasonal average.

Josh Tippin, vp of fuels and energy services, Penske Transportation Solutions, Reading, Pa., says an inability to produce enough refined diesel will lead to price increases. He points to EIA's projections that prices will likely fall in the \$4 to \$4.50 range next year.

"The \$4.00 to \$4.50 number is conservative, assuming all things are equal," Tippin says. "We're running between 92% and 94% refinery utilization, which means we can't make any more refined product if we want to. That means we have to import more to feed the demand."

John Gaudet, CTB, vp, of business development for RLS Logistics, Glassboro, N.J., expects diesel prices



While the average price for diesel fuel nationally was \$4.63 for the week ended Sept. 18, it ranged from \$4.35 on the Gulf Coast to \$6.19 in California.

to continue climbing through the balance of 2023 and into 2024.

"America consumes about 20 million barrels a day of oil and produces about 13 million, much of which gets exported," says Gaudet. "Unfortunately, I don't see oil prices coming down anytime soon, and will probably be the talk of 2024."

Gaudet says that predictions of a colder-than-normal winter, if proven prescient, may create competition for refining capacity between diesel fuel and home heating

Kroger was the first to come on board, ordering the hybrid unit for its fleet and committing to being the pilot customer for fully electric transport refrigeration units.

oil. He also thinks the federal government is limited in what it can do to supplement the nation's supplies and keep prices down.

The United States tapped into the strategic petroleum reserves in 2021 to combat the rising fuel prices. Since then, our strategic petroleum reserves have decreased from about 640 million barrels to 350 million barrels, Gaudet says.

But Tippin and Gaudet are optimistic about the ability of the industry to address current challenges after successfully navigating similar situations in recent years on the pricing and supply chain sides.

Tippin, who says "stress creates innovation," believes ►

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- ▶ companies have become more responsive from a pricing perspective to protect margins. “Historically, there was a wait-and-see mentality. Now, it’s ‘I can’t really afford to wait and see,’” since smart businesses have made those adjustments.

Gaudet is a big believer in trading partner collaboration. “These past few years have taught us to be prepared for anything, so I feel that the lessons learned will have a lasting impact. Retailers and CPG companies worked well together to adjust their contracts to support one another. The hard work has paved the pathway for any future volatility that may come our way,” he says.

Rising fuel prices reinforce the need to follow best practices regarding investments in both human and physical resources. Driver training is critical in achieving greater fuel efficiency by reducing idling times and other practices like lowering top-end speeds



Photo courtesy of Penske Travel Solutions

Ways to increase fuel efficiency include low-resistance tires, lift-axles on trailers, trailer tails and auxiliary power units.

Experts who subscribe to the ‘you treasure what you measure’ theory recommend making use of telematics or other systems to track and provide feedback to drivers.

on the road.

Experts who subscribe to the “you treasure what you measure” theory recommend making use of telematics or other systems to track and provide feedback to drivers with the goal of continuously improving their personal performances.

There are plenty of present opportunities and others on the horizon that can help you get more per mile out of your fleets. Smart operators “are chasing down the last bit of efficiency they can gain from their equipment by turning it over faster and keeping newer equipment. Newer equipment is always going to be more efficient than older equipment,” says Tippin.

“Preventive maintenance is an expense upfront, but it’s a reduction in the long run. Fleets that take shortcuts find themselves paying more in the long run. Keeping your fleet maintained properly is going to pay dividends even though it’s an upfront cost,” Tippin adds.

There are opportunities to increase fuel efficiency through equipment upgrades such as low-resistance tires, lift-axles on trailers, trailer tails (to reduce drag) and auxiliary power units. It’s also possible to see improvement by focusing on trip planning using increasingly sophisticated software programs. Coordination between trading partners is critical to reduce expenses at warehouse facilities.

Gaudet says that while the industry has learned a lot in recent years and made adjustments for the better, more can be done. “We still witness long unloading delays at grocery warehouses, which result in increased idle and reefer running time,” he notes.

Other experts suggest deploying hybrid vehicles or those that use alternative fuels such as natural gas to reduce exposure to swings in

the diesel market that are primarily the result of production quotas set by nations outside the United States.

Gaudet says it’s worth keeping an eye on the joint venture between Horstmar, Germany-based Schmitz Cargobull and Utility Trailer Manufacturing Company, City of Industry, Calif. The venture, Cargobull North America (CBNA), was announced at the International Foodservice Distributors’ Association Solutions Conference in September in Fort Worth, Texas.

KROGER PILOTS NEW TRUs

CBNA is rolling out two new transport refrigeration units (TRUs) — a hybrid unit and an all-electric, that meet the California Air Resources Board (CARB) emissions requirements. The units are expected to deliver up to 20% reductions in fuel consumption. Kroger was the first to come on board, ordering the hybrid unit for its fleet and committing to being the pilot customer for fully electric transport refrigeration units.

“What will be necessary to watch is how the current cold supply chain infrastructure pivots to support these advancements,” says Gaudet. “As we develop new space, we need to consider the future use of the space as it relates to technology to reduce the overall carbon footprint.” ■



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Thin-Crust Pizza

Milwaukee-based Connie's Frozen Pizza (conniesnaturals.com), part of the Palermo's family of brands, adds two new flavors to its Classic Thin Crust lineup.



Made with all-natural ingredients, newcomers 4 Meat (22.65 ounces) and BBQ Chicken (21 ounces) deliver authentic pizzeria taste and contain no artificial colors, flavors or preservatives. Pizzas are packed 12 to a case, and SRP is \$9.99. They're available at select Midwest retailers starting this month.

Plant-Based Cheese Spreads

Miyoko's Creamery (miyokos.com), Sonoma, Calif., launches a line of Plant Milk Cheese Spreads crafted from a traditionally cultured cashewmilk base using time-honored cheese-making techniques. Free of lactose, soy,



palm oil and gluten, the vegan dips come in four certified organic, kosher flavors: Classic Chive, Garlic Herb, Roadhouse Cheddar and Sundried Tomato. They're offered in 8-ounce containers packed six to a case. SRP is \$6.49.

Healthy Kid-Friendly Classics

Teton Waters Ranch (tetonwatersranch.com), Loveland, Colo., introduces a line of fully cooked kid-friendly classics with a healthy twist. Made with certified humane, 100% grass-fed beef blended with nutritious veggies, the Teton Taste Buds collection includes 12-ounce Burger Buddies, 15-ounce Corn Pups (mini corn dogs), 12-ounce Meatball Buddies and 8-ounce Top Dogs (uncured beef hot dogs), the latter of which is a NEXTY Award finalist. All four SKUs are lower in fat, sodium, cholesterol and calories than their conventional counterparts, and they contain no added hormones or antibiotics, no added nitrates or nitrites, and no added sugar. Frozen Burger Buddies,



Buddies, Corn Pups and Meatball Buddies are packed eight to a case and carry an \$11.99 SRP. Top Dogs come 12 to a case and are expected to retail for \$6.99.

Allergen-Free Crustless Sandwiches

Fargo, N.D.-based SunButter (sunbutter.com) debuts nut allergen-free crustless frozen sandwiches made with its



own sunflower seed butter and no high fructose corn syrup, artificial flavors, sweeteners or preservatives. Produced in a facility certified free from

the top food allergens, plant-based Jammies come in two flavors — Grape and Strawberry — that deliver 7 grams of protein per serving. Each 8-ounce box (eight per case) contains four individually wrapped 2-ounce sandwiches. SRP is \$6.49. Club-size 12-packs are also available.

Bacon Cheddar Franks

Hofmann Sausage Co. (hofmannsausage.com), Syracuse, N.Y., builds on the success of its top-selling Natural Casing German Franks with new Natural Casing Bacon Cheddar Franks. Created using the company's original German Franks recipe, the fully cooked franks feature real bacon and Wisconsin cheddar cheese plus a natural lamb casing. They're also gluten-free and contain no fillers or added MSG. Packed 12 to a case, each 14-ounce package contains six franks. SRP is \$6.49.



Lactose-Free Skyr

Portland, Maine-based Thor's Skyr (thorsskyr.com) expands its line of all-natural, American-made skyr with three new flavors: Key Lime, Coffee and Coconut. Produced using traditional Icelandic methods, the entire collection boasts a new lactose-free formulation that's naturally sweeter (eliminating the need for added sugar) and delivers more protein per serving (18 to 21 grams). Thor's Skyr is thicker than yogurt but contains only 2% fat. Six-ounce cups are packed eight to a case. SRP is \$2.29.



LET'S GO FISHing!

Many veterans never ask for help, even if they need it desperately. They may believe they didn't do enough, or suffer from survivor's guilt and feel they deserve nothing. That's where FISH — Friends in Service of Heroes — steps in.

OUR MISSION

FISH provides needed support to active and prior members of our military and their families. Our all-volunteer 501(c)(3) organization also raises public awareness of the sacrifices these men and women have made.

OUR ACHIEVEMENTS

Here are just a few of the ways your donations and support of FISH have helped provide assistance to our military families, at no cost to them:

- Presented 12 specialty designed outdoor track chairs for amputees/mobility-impaired veterans.
- Awarded 40 *life-changing* and *life-saving* trained and certified service dogs to veterans suffering from PTSD and anxiety.
- Provided over 10,000 meals to veterans and their families.
- Aided more 1,300 families and individual veterans with financial support.
- Improved the quality of life for 36 veterans with mobility scooters.
- Brightened the holidays for 660 families needing extra support for the holidays.

Since its founding in 2013, FISH has donated more than \$1 million in goods and services for our military and their families. Founding members from our industry included Johnny Harris, Gary Spinazze and Bob Savage. Each day brings new opportunities for us to enhance the quality of life for these heroes and their families.

We find and help these men, women and their families. We remind them of how valuable their service to our freedom truly was — and is. We help them regain their pride and provide a hand up — not handout. If they need help with food, utility payments, rents, vehicles and finding jobs, we're there for them.



Christmas with our Troops.

We also step in if they need service dogs, medical equipment and medical/dental services. **What would take the VA months, we can often provide in hours.**

FISH is 100% volunteer. We have no salaries, low overhead and no federal funding. Every dollar makes a difference. We are not ashamed, but proud, to be asking for your help.

Let me give you just one example of what FISH did over Christmas. We held a "Christmas With The Troops" event on December 1 with Rob Carson of NewsMax TV who served as the event's MC. Special guests included:

- Santa Claus, Mrs. Claus, and several Walmart executives.
- Kansas City Chiefs tight end Noah Gray.
- A special video greeting from Ted Nugent.
- Several former KC Royals and KC Chiefs

The evening was more than just a holiday gathering. Thirty-three military families received over \$30,500 in Walmart gift cards from FISH as a Christmas thank-you. We also provided a Vietnam veteran in desperate need of a quadriplegic mobility chair and an Iraq and Afghanistan war veteran with a trained service dog. All told, \$55,500 in FISH assistance was presented to our active duty military, veterans, and military families at our Christmas party alone.



Paul Chapa
President of FISH

READY TO HELP US MAKE A DIFFERENCE?

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Pat Buckley, Marine Vietnam Veteran.
With prolonged mobility issues, he received Track Chair number eleven from FISH. In Pat's words, "the chair has been a life changer." Check out: <https://www.youtube.com/watch?v=XmRmIo5NVqU>



Organic Cinnamon Bun Protein Balls

Scott's Protein Balls (scottsproteinballs.com), Farmingdale, N.Y., adds a 10th flavor to its line of "fridge-fresh" plant-based protein snacks. Created in collaboration with Daily Dose founder and CEO Tricia Williams, the new Cinnamon Bun flavor is the second made with all-organic ingredients. The nutrient-dense, allergen-friendly snacks are free of gluten, dairy, nuts and soy and contain no preservatives, GMOs or added sugar. They're packed with superfoods and deliver 8 grams of protein per serving. Each 2.4-ounce bag (six per case) contains four protein balls. SRP is \$5.99.



Steakhouse Style Plant-Based Burgers

Battle Creek, Mich.-based Kellogg's adds premium plant-based Steakhouse Style Burgers to its MorningStar Farms lineup (morningstarfarms.com). Thick cut and juicy, the pre-seasoned patties boast a beefy flavor and texture similar to real meat but contain 42% less fat than ground beef and 21 grams of protein per serving. The PBFA-certified, vegan burgers can be heated on the grill or in a skillet, oven, air fryer or microwave. Each resealable 16-ounce package includes four quarter-pound burgers. SRP is \$9.19.



Classic Crust Pizza

Solon, Ohio-based DiGiorno, part of the Nestlé USA family of brands, launches a new line of thin crust pizzas. The 10th crafted crust option offered by the brand, the Classic Crust collection features a crispy, buttery thin



crust loaded with half a pound of sauce, 100% real cheese and other toppings. Available varieties include Pepperoni, Cheese, Meat Lovers (pepperoni, sausage and bacon) and Supreme (pepperoni, sausage, peppers and onions). The 19.1- to 20.8-ounce pies carry a \$5.49 SRP.



Sour Cream Dips

Dallas-based Daisy (daisybrand.com) introduces a pair of dips made with its own sour cream blended with flavorful herbs and spices. Available varieties include French Onion with delicate garlic undertones and Creamy Ranch with full-bodied garlic flavor. Free of thickeners, stabilizers, preservatives, added MSG and non-dairy allergens, the clean-label dips come in 16-ounce tubs.

Artisanal Macadamia Milk

Milkadamia (milkadamia.com), Burr Ridge, Ill., debuts a new collection of premium plant-based milks made from a short list of organic ingredients, including pure-pressed macadamia nuts sustainably farmed in Australia. The refrigerated Milkadamia Artisanal lineup includes five varieties free of gums, added flavors, oils and fillers: Original Macadamia Milk, Unsweetened Macadamia Milk, Macadamia and Oat Milk, Macadamia and Coconut Milk, and Macadamia and Almond Milk. The product is offered in 33.8-ounce/1-liter tetra paks (six per case) with a \$6.49 SRP.



Beauty Wellness Shake

Remedy Organics (remedyorganics.com), Bergenfield, N.J., expands its line of plant-based, superfood-packed functional beverages with a new blend designed to nourish from within. Billed as the first-ever ingestible beauty wellness shake, Super Ube Glow features a proprietary blend of antioxidant-rich purple sweet potato, pomegranate extract, camu camu and coconut combined with almond milk, MCT oil and prebiotics. It offers 12 grams of plant-based protein per serving, promotes gut and brain health and supports natural collagen production. The certified organic, gluten- and soy-free beverage is available in 12- and 32-ounce bottles, both packed six to a case. SRPs are \$4.99 and \$8.99, respectively.



Ajinomoto Foods	ajinomotofoods.com	2 & 3
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Athens Foods	athensfoods.com	39
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NestFresh	nestfresh.com	36
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Oggi Foods	oggifoods.com	5
On-Cor	on-cor.com	77
Plum Creek Foods	plumcreekfoods.com	11
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Request Foods	requestfoods.com	51
Rhodes Bake-N-Serv	rhodesbread.com	15
RLS Logistics	rlslogistics.com	34
Saffron Road	saffronroad.com	35
Swaggerty's Farm	swaggertys.com	71
Tastee Choice	tasteechoice.com	53
Tippmann Group	tippmanngroup.com	83
Trans-Ocean	trans-ocean.com	57
Trion	triononline.com	7
United States Cold Storage	uscold.com	85
Wawona Frozen Foods	wawona.com	63
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PLUM CREEK DELIVERS 'HAPPINESS WITH A TWIST'

The company combines Mennonite values and (locally famous) soft pretzels to create a premium brand.

BY DENISE LEATHERS

When Keith Zimmerman and wife Kendra purchased a small plot of land near her parents' farm in 2014, all they wanted was to reopen the produce stand the family had operated for years in rural Bernville, Pa. They never imagined that just a few years later, they would be in the frozen food business producing, of all things...pretzels.

When the produce stand took off, the couple relocated the business, Plum Creek Farm Market, into a bigger space and added a Creamery. But in Pennsylvania Dutch country, nothing goes with ice cream like soft pretzels, so they decided to sell some of them, too. "It was almost an afterthought," says Zimmerman. "But within a couple of days, word of the pretzels had spread, and suddenly they were even more popular than the ice cream."

What makes them so special? Unlike Philly-style pretzels, Plum Creek's are hand-formed from a sweet

dough. "And in Mennonite culture, we cook everything with butter," says Zimmerman. "It makes a difference."

After a while, customers started to ask for soft pretzels that they could take home with them, so Zimmerman and business partner Ken Nolt, who married Keith's little sister Audrey, started to experiment with freezing. It worked, and in 2021 frozen pretzels were added to the freezer at Plum Creek Farm Market & Creamery where they quickly became a top seller. A few months later, Keith told a distributor sales rep that his company ought to sell the pretzels. He sent some samples to the home office, and within two days they were in.

"We know that if we can get our pretzels past their teeth, people will love them," says Nolt, who likes the idea of sharing Mennonite culture with the world.



Plum Creek pretzels are coated with butter — a staple of Mennonite cooking — offering a more premium, indulgent experience.

BUILDING A FROZEN BUSINESS

Orders for the frozen product started to come in, and the company continued to make the pretzels by hand. But the partners knew they wouldn't be able to keep up for long. So they built a production line. Although he has no formal training, Zimmerman custom-made much of the equipment himself. "I'm a ninth grade dropout," which isn't uncommon in Amish and Mennonite communities, he says. "But I started working in the steel fabrication side of our family business when I was 15. So I spent 20 years learning about mechanics and rubbing shoulders with some really innovative people."

But is the product that comes off the line Zimmerman created as good as homemade? Absolutely, says Nolt,

'I firmly believe that people don't buy what you sell, they buy who you are.'

whose official title is general manager of Plum Creek Foods — though he is just as likely to be sweeping floors or cleaning out the freezer. "Very few manufacturers coat their pretzels with butter and then flash

freeze them, so you see the butter glistening on top even before you taste it," he explains. "It's much more premium and indulgent than the typical frozen pretzel." As a result, adds Nolt, there's plenty of margin to go around.

Currently, the plant is running at only 15% capacity, leaving plenty of room for growth — and perhaps some line extensions. "We may have been a bit overcautious in the past," says Zimmerman. "But it's hard enough to get on the shelves, let alone into the freezer, so we didn't want to risk getting dropped because we couldn't fill orders." That attitude speaks to the pair's commitment to being a good partner.

"Our mission statement is to cheerfully serve each other, our customers and our vendors," says Zimmerman. "Those relationships — those people — really matter to us." He adds, "I firmly believe that people don't buy what you sell, they buy who you are." ■



Plum Creek Foods partners Keith Zimmerman (left) and Ken Nolt.



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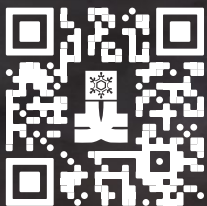
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